Oumou Yakubu

The Youth Bulge

The geopolitics of the African and South Asian youth

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THE GEOPOLITICS OF THE AFRICAN AND SOUTH ASIAN YOUTH

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Prologue

On a humid night in Niamey, Niger, a fifteen-year-old boy named Hamid scrolls through a borrowed smartphone. The median age in his country is also fifteen , the youngest on earth. Eight thousand kilometres east, in Patna, India, a nineteen-year-old girl named Priya finishes her shift at a call centre, earning just enough to keep her younger brothers in school. They have never met. They share no language, no faith, no culture. But they share a century.

By 2050, Africa and South Asia will be home to nearly half the world's children and young adults, a demographic bulge so vast it will either power the

global economy or set it ablaze. Hamid is one of 40 per cent of sub-Saharan Africans under fifteen. Priya is one of 25 per cent of South Asians in the same cohort. Together, their generation will enter a job market that currently creates only 25 million formal roles each year against a billion new workers expected by mid-century. The maths does not forgive.

This book is about that collision: between restless youth and fossilised politics, between climate displacement and fortified borders, between the promise of education and the poverty of skills. From Lagos's slums to Karachi's drone ports, from Senegal's Sufi brotherhoods to Sri Lanka's collapsed hospitals, we trace how the 'demographic dividend' became a demographic time bomb. East Asia's miracle, South Korea's manufacturing-led boom required disciplined state planning, land reform, and universal schooling 'before' democracy arrived. Today's young majorities face a crueller paradox: AI and automation gutting the very factory jobs that lifted previous generations, while Western protectionism and Gulf kafala systems offer only precarious exits.

The geopolitics are stark. China, America, and Europe compete to shape youth employment or risk instability spilling across borders. Russia's Wagner

offshoots weaponise angry young men in the Sahel; India's digital infrastructure creates remote gigs for rural millions. Meanwhile, remittances, over $280 billion flowing into both regions, exceed foreign aid and investment combined, buying time but not transformation.

We have seen this story before, but never on this scale. When a generation feels eligible for radicalisation because degrees do not deliver jobs, when climate migration reaches 200 million young people, when half of South Asia's electorate is under twenty-five, the ballot box or the bullet becomes the only question left. Kerala proved demography is not destiny. Tunisia proved removing dictators without jobs is only anarchy. The next decade will decide whether Hamid and Priya become consumers or combatants, migrants or makers. This is their century. We are merely living in it.

The demographic clock
Why Africa and South Asia are racing against time

In the wealthy world, politics is increasingly shaped by the anxieties of ageing societies. Pension systems creak, labour forces shrink and governments fret over how to finance welfare states built for a younger era. In much of Africa and South Asia, however, the problem is the opposite. There are too many young people and too few productive jobs. The question is not how to support retirees, but how to prevent millions of restless citizens from becoming trapped between demographic promise and economic disappointment.

The contrast is startling. Japan's median age is now around 48. In Niger it is closer to 15. Across sub-Saharan Africa, roughly 40% of the population is under 15 years old. In South Asia the figure is lower, though still formidable at around a quarter. These numbers are not merely demographic curiosities. They are strategic realities that will shape diplomacy, migration, economic power and security for decades to come.

The world is entering a demographic divergence unprecedented in modern history. Europe, East Asia and parts of North America are ageing rapidly, while Africa remains astonishingly young. South Asia sits somewhere in between: still youthful, though beginning to age before becoming fully rich. The result is a profound redistribution of human capital. By the end of the century, Africa alone is expected to account for a vast share of global population growth. Nigeria may surpass America in population size. India has already overtaken China.

Demography is not destiny. But it is a pressure system. Governments can channel it into prosperity or allow it to ferment into instability.

The stakes are global. For decades, economists celebrated the idea of the "demographic dividend":

the economic boost that occurs when a large working-age population supports relatively fewer children and elderly people. East Asia became the textbook example. Between the 1960s and the 1990s, countries such as South Korea, Taiwan and later China transformed huge youthful populations into engines of industrial growth. Factories absorbed labour. Education expanded rapidly. Export industries linked domestic ambitions to global markets. Crucially, these states created jobs faster than they created expectations.

That last point matters more than many policymakers admit. Young populations are not inherently dangerous. They become dangerous when aspirations rise faster than opportunities. Education without employment can be politically explosive. Urbanisation without infrastructure breeds anger. Connectivity without mobility creates humiliation. A university graduate driving a motorcycle taxi in Lagos or Dhaka is not merely underemployed; he is living proof of a broken social contract.

This is why the demographic debate is no longer a matter for development economists alone. It has become a central geopolitical question. The great powers understand this, even if they rarely say so explicit-

ly. China's engagement with Africa is often discussed in terms of minerals, ports and debt. Yet Beijing also sees the continent as a future labour reservoir and consumer market at a time when China itself is ageing at extraordinary speed. The Chinese workforce has already begun to shrink. Manufacturing costs are rising. The old assumption that China would possess limitless industrial labour has collapsed.

America, meanwhile, views demographic instability through the lens of migration and security. Washington worries that chronic unemployment across fragile states may fuel extremism, organised crime and irregular migration flows. European governments share the same fear, though often more urgently. Mediterranean politics is already shaped by migration pressures from Africa and the Middle East. Climate shocks combined with demographic stress could make the migration crises of the 2010s appear modest by comparison.

The European Union therefore faces a paradox. Economically, Europe needs migrants. Politically, many European electorates resist them. Europe's ageing societies will require workers to sustain healthcare systems, transport networks and industrial production. Yet governments simultaneously attempt to

harden borders against the very regions where labour surpluses are growing fastest.

This contradiction cannot hold indefinitely. In theory, Africa's youth bulge could help offset global labour shortages. By mid-century, wealthy economies may desperately require younger workers. Japan, South Korea, Italy and Germany are all confronting demographic contraction. Even China is ageing before achieving the productivity levels of the richest Western states. The global economy will increasingly depend on whether youthful countries can produce skilled, employable citizens capable of integrating into international labour markets.

The alternative is grim. A generation excluded from meaningful economic participation rarely remains politically passive. Across the Sahel and parts of West Africa, military coups have already become disturbingly fashionable. Mali, Burkina Faso and Niger have all experienced military takeovers in recent years, often welcomed initially by frustrated young populations who see civilian elites as corrupt and ineffective. Coups thrive where states fail to provide dignity, security or employment.

The romanticisation of military rule among parts of Africa's youth should alarm foreign policymak-

ers. It reveals a deeper collapse of faith in democratic delivery. Elections mean little to unemployed urban populations if governments cannot provide electricity, functioning schools or basic economic mobility. Democracy without economic credibility becomes vulnerable to populists in uniforms.

Climate change will intensify these pressures. Much of the world's fastest population growth is occurring in regions highly exposed to drought, flooding and agricultural disruption. As arable land declines and cities swell, demographic stress may mutate into migration crises. Climate migration is often portrayed as a future possibility. In reality, it has already begun.

The danger lies not simply in people moving, but in the speed and scale at which systems may become overwhelmed. Rapid urbanisation is already straining cities such as Lagos, Nairobi and Karachi. Informal settlements expand faster than infrastructure. Water systems fail. Electricity grids collapse. Transport networks decay. Governments struggle merely to keep pace with population growth, let alone generate prosperity.

Yet fatalism would be misplaced. Demographic explosions do not automatically produce chaos. Under

the right conditions they can produce extraordinary growth.

India illustrates both the promise and peril of this moment. The country is approaching the peak of its working-age population, with its demographic-dividend window expected to remain open into the 2030s. Indian policymakers are acutely aware that this period may not come again. China used its own demographic window to become the world's factory. India now hopes to position itself as an alternative manufacturing and technological hub.

There are encouraging signs. India has expanded digital infrastructure rapidly, improved financial inclusion and attracted significant investment in electronics manufacturing. Geopolitically, Western governments increasingly see India as a strategic counterweight to China and are eager to deepen supply-chain ties.

But India's challenge is immense. Economic growth alone is insufficient. The country must create millions of jobs annually merely to absorb new entrants into the workforce. Too much employment remains informal and low-productivity. Female labour-force participation remains disappointingly low. Educa-

tional outcomes are uneven. India's elite institutions produce world-class engineers, but large parts of the population still struggle with basic literacy and numeracy.

India's future influence will depend less on its GDP headline figures than on whether it can convert demographic scale into broad-based productivity.

Nigeria faces an even harsher test. The country possesses enormous entrepreneurial energy and vast natural resources. It also has one of the world's youngest populations. In principle, Nigeria should be an economic powerhouse. In practice, chronic underemployment, corruption, insecurity and infrastructure failure have prevented sustained transformation.

Oil wealth proved both blessing and curse. Rather than building diversified manufacturing industries, successive governments became dependent on hydrocarbon revenues. This weakened state capacity and distorted political incentives. Today, many young Nigerians are globally connected through smartphones and social media, yet locally trapped in stagnant economies.

This gap between awareness and opportunity is politically combustible. A connected generation compares its prospects not with those of its parents, but with global standards viewed online every day. Social media has internationalised aspiration. A young person in Kano or Nairobi sees the same luxury lifestyles, technological possibilities and political freedoms as someone in London or Seoul. When local systems fail to provide pathways upward, frustration becomes transnational.

Foreign powers are beginning to adapt their strategies accordingly. China funds infrastructure. Gulf states invest in ports and agriculture. Turkey expands diplomatic and commercial networks across Africa. Russia offers security partnerships and anti-Western rhetoric. Western governments speak increasingly of "resilience", "skills partnerships" and "development corridors".

Yet too much external engagement remains driven by short-term strategic competition rather than long-term state-building. The uncomfortable truth is that no amount of diplomacy can compensate for absent domestic governance. East Asia's success was not accidental. South Korea in the 1960s was poorer

than many African countries are today. Its transformation required ruthless focus on education, industrial policy and export competitiveness. Authoritarian governments suppressed instability while building economic capacity. Democracy arrived later, after a substantial middle class had emerged. This history creates awkward questions for contemporary development orthodoxy.

Western policymakers often assume that democratic institutions alone generate prosperity. The East Asian experience suggests something more complicated: capable states matter first. Elections without administrative competence achieve little. Young populations need jobs faster than they need constitutional theory. If democratic governments cannot deliver material improvement, alternative political models gain appeal.

That does not mean authoritarianism is preferable. Many dictatorships have produced catastrophe rather than growth. But it does mean that governance quality matters more than ideological labels.

The coming decades will test whether the international system can manage demographic imbalance without descending into fragmentation. Rich coun-

tries will need workers. Poor countries will need jobs. Migration pressures will rise regardless of political rhetoric. Climate disruption will amplify instability. Artificial intelligence may further complicate matters by reducing demand for low-skilled labour just as youthful populations surge.

The demographic clock is ticking unevenly across the world. In ageing societies, the fear is decline. In youthful ones, the fear is exclusion. Somewhere between these two anxieties lies the defining geopolitical challenge of the century.

The countries that succeed will not necessarily be those with the youngest populations or the oldest institutions. They will be those capable of aligning demography with productivity, aspiration with opportunity and growth with legitimacy.

History suggests the window is narrow. East Asia used its demographic moment before ageing set in. India may have little more than a decade to do the same. Much of Africa has longer, but also faces steeper obstacles. If governments fail to create jobs, educate effectively and maintain political legitimacy, today's youth bulge may become tomorrow's instability belt.

If they succeed, however, the world's youngest regions could rescue the global economy from demographic stagnation. The century may ultimately belong not to the oldest powers, but to the societies that learn fastest how to employ their young.

The jobs mirage

The world is about to experience the largest labour-market shock in modern history. By 2050 roughly one billion additional workers, most of them in Africa and South Asia, will enter working age. Never before has such a vast cohort of young people arrived at precisely the moment when technology is beginning to replace the very forms of labour that once lifted countries out of poverty.

For two centuries industrialisation followed a familiar script. Nations moved workers from farms into factories, from factories into services, and eventually into advanced industries. Britain did it with textiles, Germany with steel, Japan with automobiles, China

with almost everything. Cheap labour attracted foreign investment; exports financed development; rising wages created a middle class. Economic history seemed to offer a dependable escalator.

Now the escalator is slowing just as the queue becomes unimaginably long. The arithmetic alone is alarming. Around 25m formal jobs are created globally each year. Yet in many years the developing world adds nearly twice that number of young entrants to the labour force. Africa's population will double by mid-century. South Asia continues to expand. Nigeria may surpass America in population before the century ends. India already graduates millions of young people annually into an economy unable to absorb them. Pakistan, Ethiopia and Bangladesh confront similar pressures in different forms.

In previous eras economists would have assumed that labour-intensive manufacturing would absorb the surplus. But automation is disrupting that assumption. The classic development ladder is being pulled away just as poorer countries prepare to climb it.

The geopolitical irony is striking. Rich countries spent decades encouraging globalisation, outsourcing and integrated supply chains. Now they speak

increasingly of “reshoring”, “friend-shoring” and industrial sovereignty. The same Western governments that once championed free trade now subsidise domestic industries and worry openly about dependence on Asian manufacturing.

Yet the West still needs cheap production. Its populations are ageing. Labour costs remain high. Inflation has made affordable imports politically indispensable. The global economy therefore exists in an awkward contradiction; rich countries want the benefits of global manufacturing without the vulnerabilities of global labour dependence.

Technology appears to offer a compromise. Robots do not strike, migrate or demand pensions. Artificial intelligence can manage logistics, quality control and customer service. Automated warehouses require far fewer workers than the factories of the 1990s. A garment plant that once needed thousands may soon require hundreds.

Bangladesh illustrates the dilemma. The country built its development model on low-cost textile exports. Millions of women entered the workforce through garment factories, reshaping both society and household incomes. Yet automation is creeping

steadily into the sector. Robotic cutting, AI-assisted inventory management and semi-automated sewing systems threaten the very comparative advantage on which Bangladesh relied.

The trouble is not that robots will eliminate all jobs tomorrow. It is that they will reduce the scale of employment growth exactly when population growth demands acceleration.

Ethiopia offers another version of the same story. For years it was heralded as Africa's manufacturing frontier. Industrial parks promised a Chinese-style transformation. Foreign investors arrived seeking cheap labour. Policymakers dreamed of export-led development. Yet global manufacturers increasingly calculate that automation at home may prove cheaper and geopolitically safer than managing fragile overseas supply chains. Ethiopia's political instability merely reinforced the trend.

The result is a development trap unprecedented in modern economic history: countries are industrialising into an era where industry itself employs fewer people.

The consequences are already reshaping regional politics. Across South Asia and Africa, urban elites

are adapting to the digital economy far faster than rural populations. The gap is no longer simply about wealth. It is about integration into global systems of value.

Pakistan's gig economy offers a revealing example. Urban graduates increasingly earn income through freelance coding, digital marketing, online tutoring and remote contract work. In Karachi, Lahore and Islamabad, parts of the middle class have effectively plugged themselves into the global services economy. Dollar-denominated online earnings provide an escape from domestic stagnation.

But this model scales poorly. Gig work rewards English fluency, internet access and technical literacy. It benefits those already connected to urban educational networks. Millions of poorly educated rural youths remain excluded. The digital economy creates islands of prosperity rather than broad industrial employment.

Rwanda presents another developmental experiment. The country has invested heavily in technological symbolism: drone-delivery networks, smart-city projects, digital governance and logistics hubs. Such initiatives attract admiration from donors and inves-

tors. They project modernity and competence.

Yet drones do not employ millions. Nor do data centres or fintech applications. Rwanda's technological ambitions may improve efficiency and governance, but they cannot absorb a rapidly growing low-skilled population. The risk is that governments mistake visibility for scale. A drone port photographs beautifully. A labour-intensive manufacturing base transforms societies.

This divergence is becoming politically combustible. Urban elites increasingly participate in global digital capitalism while rural populations remain trapped in informal economies. In many countries the educated young aspire not to build domestic industries but to leave altogether.

The brain drain is accelerating. Doctors depart Nigeria for Britain. Engineers leave Pakistan for the Gulf. Indian software developers migrate to America or Europe. African nurses sustain Western healthcare systems while local hospitals struggle. Rich countries, facing demographic decline, are effectively importing human capital from poorer nations.

Thus emerges the defining labour paradox of the century: low-skilled workers compete against ma-

chines while high-skilled workers emigrate towards richer markets. This is not merely an economic problem. It is a geopolitical one.

Europe already senses what lies ahead. Migration debates dominate elections from Italy to Sweden. Right-wing parties portray demographic pressure from Africa and South Asia as a civilizational threat. Border enforcement grows harsher even as European economies quietly depend on migrant labour.

The contradiction is glaring. Europe needs workers but fears migration politically. Africa needs jobs but cannot create them fast enough. The result is a permanently unstable equilibrium.

Climate change will intensify matters further. Agricultural disruption across the Sahel, South Asia and parts of East Africa may push millions more towards cities or across borders. Urbanisation without industrialisation produces fragile megacities marked by unemployment, informality and resentment.

History suggests that large populations of underemployed young men rarely produce political stability. The Arab Spring emerged partly from youth unemployment and economic frustration. Similar

dynamics are visible elsewhere: protests in Kenya, unrest in Nigeria, political volatility in Pakistan.

Governments facing such pressures may turn increasingly authoritarian. Surveillance technologies powered by AI will make repression easier and cheaper. States unable to provide prosperity may instead provide digital control.

This too alters geopolitics. China's model of technologically enabled authoritarian development becomes more attractive to fragile governments than Western liberal prescriptions. The competition between democratic openness and technocratic control may increasingly hinge on employment outcomes rather than ideology alone.

For years policymakers responded to automation fears with a comforting slogan: education. Teach everyone to code. Build digital skills. Prepare workers for the economy of the future.

But the future economy may not require as many humans as once assumed. Artificial intelligence is beginning to automate white-collar tasks once considered safe. Basic programming, customer support, accounting and administrative functions are increasingly vulnerable. The assumption that every

developing country can become a digital-services powerhouse resembles a fantasy of universal upward mobility in an economy structurally incapable of providing it.

Not everyone can be a software engineer. Nor can every nation become an AI hub. The more profound challenge is that AI compresses the value of middle-skill work. At the top sit highly educated specialists who design, manage and own technological systems. At the bottom remain manual service roles resistant to automation but often poorly paid. In between lies the shrinking terrain where mass middle-class employment once flourished. For developing countries this is disastrous timing. They are encountering post-industrial labour dynamics before fully industrialising.

In searching for solutions, policymakers often look towards Silicon Valley or Shenzhen. They might instead study Germany. Germany's dual education system, combining vocational training with academic instruction, was designed for an industrial economy requiring technically competent workers without necessarily demanding university degrees. Apprenticeships carry social legitimacy. Manufacturing retains prestige. Skills are tied closely to employer needs.

What makes the model attractive for poorer countries is not merely its efficiency but its realism. It recognises that societies require large numbers of technically capable workers who are neither elite professionals nor unskilled labourers.

Adapting such systems to Africa and South Asia would require major changes. Many developing countries lack strong industrial employers able to sustain apprenticeship networks. Informal economies dominate. Educational systems are often underfunded and overly theoretical.

Yet the principle remains valuable: education must connect directly to practical economic structures rather than abstract aspirations. In low-digital settings especially, vocational systems may offer more resilience than fantasies of mass coding academies. Skills related to construction, logistics, repair, agriculture, healthcare support and local manufacturing remain difficult to automate entirely. Countries need educational architectures that produce adaptable workers rather than simply credentialled graduates.

There is also a diplomatic dimension. Europe, anxious about migration, has strong incentives to support employment creation abroad. Gulf states seeking economic diversification need skilled labour

pools nearby. Asian manufacturing powers require stable supply chains and consumer markets.

Yet international cooperation remains remarkably fragmented. Development finance still prioritises infrastructure and macroeconomic reform over labour absorption itself. Policymakers speak constantly about innovation but far less about employment density.

The uncomfortable truth is that the global economy has become extraordinarily good at generating wealth while becoming steadily worse at generating mass employment.

The central geopolitical question of the coming decades may not be who dominates artificial intelligence or semiconductor production. It may be far simpler, how do societies maintain stability when economic growth no longer guarantees sufficient work?

The old social contract assumed that each generation would find broader opportunity than the last. That assumption is weakening across rich and poor countries alike. But in Africa and South Asia the scale is vastly larger. Hundreds of millions of young people

cannot simply be retrained into abstract "knowledge economy" roles.

Some optimists argue that new industries will emerge as they always have. Perhaps they are right. Technological revolutions often create jobs unforeseen at the outset. Yet history offers little reassurance that such transitions occur smoothly or quickly enough to absorb demographic shocks of this magnitude.

What seems increasingly plausible is a prolonged era of uneven labour markets: islands of high productivity surrounded by oceans of informality and insecurity.

The geopolitical consequences will ripple everywhere. Migration crises will intensify. Nationalism will grow. Brain drains will accelerate. Urban-rural divides will harden. Governments will struggle between welfare provision and repression. Great powers will compete not only through trade and military alliances but through rival models of managing surplus populations.

For decades the world worried about a future with too few workers because of ageing populations in

rich countries. It may instead confront a split reality: labour shortages in wealthy societies alongside labour surpluses in poorer ones, connected uneasily through migration barriers, digital platforms and geopolitical suspicion.

The great employment machine of industrial capitalism once integrated billions into modern economies. Artificial intelligence and automation may prove far more efficient. But efficiency is not the same as stability. A world that cannot find productive roles for its young people is not merely an economic risk. It is a geopolitical tinderbox waiting for a spark.

Youth bulge and ballot boxes

In much of the world, politics is growing younger while power remains stubbornly old. Across South Asia, nearly half the population is under 25. Africa now possesses the youngest electorate on Earth. From Dakar to Dhaka, Nairobi to Niamey, millions of first-time voters are entering political systems designed by men old enough to be their grandfathers. This demographic transformation is not merely a social fact. It is rapidly becoming the defining geopolitical contest of the 21st century.

The question confronting governments is deceptively simple: can democracies absorb and empower this generation quickly enough, or will frustrated

youth conclude that order matters more than liberty? In capitals from Moscow to Beijing, authoritarian powers are betting on the latter.

The stakes extend far beyond domestic politics. Youth unemployment, digital mobilisation and urban frustration now shape diplomacy, security alliances and foreign influence campaigns. A generation armed with smartphones but denied economic opportunity has become both the greatest democratic opportunity and the greatest destabilising force of the modern era.

For years, policymakers spoke confidently about the "demographic dividend". Young populations, they argued, would generate innovation, labour-force expansion and economic growth. Yet demographics alone guarantee nothing. A youth bulge without employment, housing or political inclusion can become a demographic time bomb.

This reality is increasingly visible across Africa and South Asia alike. In countries where economic growth has failed to keep pace with population expansion, democracy itself is beginning to look fragile. Elections no longer inspire optimism when they repeatedly produce corruption, inflation and exclu-

sion. For many young citizens, democracy is judged less by constitutional ideals than by whether it can provide work, dignity and stability.

The danger for liberal democracies is that impatience among young voters is colliding with a global authoritarian revival. Russia and China, though operating differently, have both understood the geopolitical implications of youth frustration.

Russia's approach is cynical and militarised. In the Sahel, Wagner, now reorganised under the banner of Africa Corps, has exploited disillusionment among young men abandoned by weak states and shrinking economies. In Mali, Burkina Faso and Niger, anti-French sentiment and frustration with civilian governments created fertile ground for military juntas promising sovereignty and strength. Moscow offered not democratic reform but a simple narrative: Western-backed liberalism had failed, and only force could restore order.

The appeal should not be underestimated. For unemployed young men in fragile states, military regimes can appear decisive compared with civilian governments paralysed by corruption and bureaucracy. Russian propaganda has skilfully portrayed

coups not as democratic collapses but as anti-colonial revolutions. It is a powerful message in regions where memories of exploitation remain politically potent.

China's model is subtler but perhaps more dangerous for liberal democracies in the long run. Beijing offers a vision of technocratic stability without political chaos. Its message to developing nations is clear: prosperity does not require Western-style democracy. High-speed railways, industrial parks and digital infrastructure are presented as evidence that competent authoritarian governance delivers results faster than electoral politics ever could.

For young populations facing unemployment and crumbling public services, this argument carries increasing weight. Democratic systems that appear incapable of basic state delivery lose credibility rapidly. Young voters may tolerate restrictions on political freedoms if governments can provide jobs, transport, affordable housing and reliable electricity. The social contract is changing.

This tension between democratic aspiration and authoritarian efficiency is playing out vividly in regional politics. Kenya's 2024 Gen Z protests revealed

both the promise and peril of youth politics in Africa. Sparked by proposed tax increases, the demonstrations rapidly evolved into a broader rejection of elite governance. What distinguished the protests was not merely their scale but their decentralised character. They were leaderless, digitally organised and fiercely independent of traditional political parties. Young Kenyans used social media with extraordinary sophistication, mobilising faster than the state could respond.

In many respects, the protests represented democratic vitality. Young citizens were engaging politically, demanding accountability and rejecting ethnic patronage politics that have long dominated Kenya. Yet the unrest also exposed a growing crisis of legitimacy. Many young protesters no longer believed formal democratic institutions could meaningfully represent them. Elections alone were insufficient. They wanted responsiveness between elections, not simply the ritual of voting every few years.

Senegal offered a parallel lesson from the opposite direction. When President Macky Sall attempted to postpone the 2024 election, public outrage exploded. Senegal had long been considered one of West Africa's most stable democracies. Yet even there, younger

voters reacted furiously to any suggestion that constitutional rules could be manipulated for political convenience.

The backlash ultimately forced a reversal, demonstrating that African youth are not inherently hostile to democracy. On the contrary, many remain deeply committed to constitutional order. But their support is conditional. They expect institutions to function fairly and transparently. Unlike previous generations, they are less patient with elite bargains and less willing to defer to political authority.

This is the paradox confronting modern democracies: today's youth are simultaneously more politically engaged and more institutionally sceptical. Technology intensifies both tendencies. Social media enables unprecedented political participation while simultaneously eroding trust in traditional institutions. Young voters can organise protests within hours, but they are also exposed to disinformation, populism and radicalisation at enormous scale. Digital politics rewards outrage more than compromise.

Governments have responded unevenly. Some states are experimenting with democratic innovation. Proposals for e-voting, digital consultation platforms and youth quotas aim to integrate younger

citizens more effectively into political systems. Such reforms recognise an unavoidable reality: political institutions designed in the mid-20th century may not satisfy digitally native populations in the 21st.

Youth quotas, though controversial, are gaining traction precisely because traditional political classes often appear detached from demographic reality. In countries where the median age is below 20, parliaments dominated by elderly elites increasingly look absurd. Representation matters not merely symbolically but practically. Younger politicians are often better positioned to understand the economic anxieties and cultural dynamics shaping younger electorates.

Yet institutional reform alone will not solve the underlying crisis. The core issue remains economic. No political system can remain stable if millions of educated young people see no path towards meaningful employment or social mobility.

Tunisia offers the clearest warning. The Arab Spring began with democratic hope and revolutionary optimism. For a brief moment, Tunisia appeared to demonstrate that authoritarian regimes could be replaced peacefully by pluralistic politics. Western governments celebrated it as a model transition.

But democracy without economic transformation proved unsustainable. Youth unemployment remained stubbornly high. Corruption persisted. Public services deteriorated. Over time, democratic institutions became associated not with empowerment but with stagnation and dysfunction. Many Tunisians concluded that freedom without opportunity was an empty bargain.

President Kais Saied's subsequent power grab succeeded partly because democratic legitimacy had already eroded. Tunisians did not suddenly become authoritarian by instinct. Rather, many lost faith that democratic politics could improve their lives. The lesson is brutal but essential: removing dictators is easier than building functioning economies.

The same danger now looms elsewhere. Across parts of Africa and South Asia, young citizens increasingly judge governments by outcomes rather than ideology. They care less about whether leaders are liberal or authoritarian than whether they can govern competently. This creates fertile ground for strongmen who promise efficiency, discipline and national renewal.

Military juntas understand this psychology well. In Mali, Burkina Faso and Niger, coup leaders por-

trayed themselves not as enemies of democracy but as saviours of the nation. They exploited public anger at insecurity, unemployment and perceived foreign domination. Their rhetoric blended nationalism, anti-elitism and promises of restored dignity.

The troubling reality is that such narratives often resonate because civilian governments genuinely have failed many young people. Liberal democracies frequently assume that authoritarianism triumphs primarily through coercion. In truth, it often advances through democratic disappointment.

None of this means democracy is doomed in the developing world. Young populations can also become engines of democratic renewal. Africa's youth are among the most entrepreneurial and digitally connected in the world. South Asia possesses enormous technological and educational potential. If harnessed effectively, these generations could revitalise democratic governance rather than destroy it.

But this requires a fundamental shift in political thinking. Governments cannot treat youth merely as electoral demographics to be managed through slogans and symbolic gestures. They must become central actors in national development strategies.

Job creation is paramount. Not temporary public-sector schemes or patronage networks, but genuine economic transformation capable of absorbing millions of young workers annually. Industrial policy, vocational training and infrastructure investment are no longer simply economic questions. They are matters of national security.

Equally important is institutional credibility. Young voters may forgive hardship if they believe systems are fundamentally fair. They are far less forgiving of corruption, impunity and elite hypocrisy. Democracies that fail to reform risk producing citizens who no longer believe democracy deserves preserving.

The geopolitical implications are immense. The contest between democratic and authoritarian models will increasingly be decided not in wealthy Western capitals but in youthful societies across Africa and Asia. If democracies cannot deliver economic inclusion and responsive governance, authoritarian powers will eagerly fill the vacuum.

Russia offers rage and militarism. China offers order and technocratic competence. Liberal democracies, by contrast, must prove they can offer both freedom and functionality.

That is the real challenge of the coming decades. The future of global democracy may depend less on constitutions and elections than on whether the world's youngest generations believe democratic systems can still build dignified lives. If they do not, the ballot box may gradually give way to the barracks.

The climate-youth nexus

The twenty-first century's defining geopolitical question may not be who controls the seas, the semiconductors or the satellites. It may instead be who absorbs the displaced young. Climate change is no longer merely an environmental crisis; it is becoming the organising principle of global demography, migration and instability. The countries most exposed to rising seas, failing harvests and desertification are also those experiencing the fastest population growth. In this convergence lies a combustible reality: a world increasingly populated by young men with too little work, too little land and too little faith in the future.

The old geopolitical vocabulary is becoming inadequate. Policymakers still speak in the language of "migration management", "border security" and "development aid", as though the movement of millions can be regulated by administrative finesse. Yet what is emerging is not a temporary migration wave but a structural transformation of human geography. Climate displacement is becoming normality. And youth are at its centre.

Nowhere is this clearer than in the Sahel, the vast semi-arid belt stretching across Africa beneath the Sahara. Once marginal to global politics, the region has become a frontline of climate insecurity. Temperatures there are rising faster than the global average. Rainfall patterns have become erratic. Pastoral livelihoods are collapsing. Meanwhile, populations are exploding. Niger, already among the world's poorest states, has one of its highest fertility rates. Mali, Chad and Burkina Faso combine ecological stress with fragile governance and insurgency.

For millions of young people, especially men, the arithmetic is unforgiving. Land shrinks. Jobs disappear. States fail to provide. Militias, criminal networks and extremist groups offer money, identity and revenge. Climate change does not directly create

terrorism or rebellion, but it acts as a relentless accelerant of existing grievances. A failed harvest becomes a recruitment drive. A dried-up river becomes a tribal conflict. A displaced village becomes a reservoir of anger.

The same dynamics haunt South Asia, albeit in different form. The Ganges Delta, home to one of the densest concentrations of humanity on Earth, faces rising seas, salinisation and increasingly violent cyclones. Bangladesh has become emblematic of climate vulnerability. Yet it is also a lesson in adaptation. Dhaka has invested in disaster preparedness, resilient agriculture and community-level climate programmes with remarkable effectiveness relative to its income level.

Still, the pressures are immense. Internal migration towards cities is accelerating. Young Bangladeshis increasingly view mobility not as aspiration but necessity. This matters far beyond Bangladesh itself. South Asia possesses one of the world's largest youth cohorts, and climate disruption is intersecting with unemployment across the region. India, despite rapid economic growth, still struggles to generate sufficient formal employment for its millions of new labour-market entrants. Pakistan faces a demograph-

ic bulge combined with chronic economic instability and water scarcity.

Water, in particular, is becoming a geopolitical fault line. The Indus river system, lifeline for both India and Pakistan, depends heavily on Himalayan glaciers now threatened by climate change. As water stress intensifies, nationalist rhetoric hardens. In such environments, unemployed and disillusioned youth become useful political instruments. Militancy and hyper-nationalism thrive where economic dignity collapses. States under stress often redirect domestic frustration outward. Young men without prospects are easily transformed into ideological foot soldiers.

Europe watches these developments with mounting anxiety, though often through the narrow lens of border defence. The continent faces a profound contradiction. Economically, it requires migrants. Demographically, it is ageing rapidly. Labour shortages already plague sectors from agriculture to elder care. Yet politically, migration has become toxic. Governments increasingly embrace "Fortress Europe" policies: externalised borders, offshore processing agreements and ever harsher deterrence measures.

This strategy rests on a dangerous illusion that climate migration can be prevented rather than man-

aged. Walls may slow flows temporarily, but they cannot erase the structural drivers behind them. When livelihoods collapse across entire regions, migration becomes adaptation. The Mediterranean is no longer merely a maritime frontier; it is the visible seam between demographic decline and demographic surplus.

Europe's political class has largely failed to articulate an honest vision. It simultaneously needs migrants and fears them. It celebrates humanitarian values while funding exclusionary systems designed to keep desperate people away. The result is moral incoherence and political fragmentation. Far-right movements exploit public fears, while centrist governments oscillate between economic pragmatism and electoral panic.

The Gulf states, by contrast, approach the matter with colder realism. Saudi Arabia, the United Arab Emirates and Qatar already rely heavily on imported labour from South Asia. As climate pressures intensify, these migration corridors are likely to deepen. Gulf economies require young workers for construction, logistics and services. South Asia supplies them in abundance.

Yet this model contains its own tensions. Gulf migration systems remain profoundly unequal, often treating workers as disposable economic inputs rather than future citizens. Climate displacement may therefore reinforce a global hierarchy in which wealthy states selectively absorb labour while denying belonging. Young migrants become economically necessary but politically excluded.

This emerging order risks creating what might be termed a permanent precariat of climate mobility: millions of young people moving continually between unstable homelands and inhospitable host societies. Such populations are difficult to integrate and easy to radicalise. Anger accumulates not only from poverty but from humiliation. The perception of exclusion, of being needed but unwanted has historically proven politically explosive.

By 2050, estimates suggest that climate displacement could affect between 50m and 200m people. Such figures are necessarily imprecise, yet the trend is undeniable. Most will not fit the traditional image of refugees crossing oceans. Many will move internally, from countryside to city, from coast to inland regions, from failing agricultural zones to fragile urban peripheries. But large international flows are inevitable too.

Crucially, many of these migrants will be young men. Demography matters. Youthful populations are historically associated with dynamism and innovation when economies are functioning well. When they are not, they can become sources of unrest. A world in which millions of young men experience simultaneous displacement, unemployment and political disenchantment is a world entering dangerous territory.

And yet fatalism would be misplaced. Some of the most innovative responses to climate insecurity are emerging from precisely the regions most exposed to it. Bangladesh, often portrayed solely as victim, offers important lessons in resilience. Floating farms, agricultural platforms designed to withstand flooding, demonstrate how adaptation can be practical rather than rhetorical. Community-led climate brigades composed largely of young volunteers have helped improve disaster response and local preparedness.

The significance of such initiatives extends beyond technical ingenuity. They offer young people agency. This is essential. Climate politics in wealthy countries often centres on protest movements demanding state action. In vulnerable countries, the challenge is more immediate: survival through adaptation. Youth must

not simply become symbols of climate anxiety; they must become participants in climate governance.

This demands a shift in diplomatic thinking. Climate negotiations have long revolved around emissions targets, financing pledges and technological transitions. Important though these are, they remain insufficient. The next phase of climate diplomacy must focus equally on mobility, labour integration and demographic management. Migration can no longer be treated as a side effect of climate change. It is one of its central geopolitical outcomes.

Rich countries will have to abandon the fantasy of absolute border impermeability. Poor countries will need support not merely to reduce emissions but to create economic systems capable of absorbing youthful populations. Regional organisations must begin treating climate displacement as a security issue in the broadest sense, not simply a humanitarian challenge, but a determinant of future stability.

The alternative is increasingly visible already: militarised borders, collapsing states, urban unrest and the politicisation of displaced youth by extremists and demagogues alike. Climate change is redrawing the map of human movement. Diplomacy, still

trapped in the assumptions of a more stable century, is struggling to catch up.

The age of climate displacement has begun. Its face will be overwhelmingly young. Whether that youth becomes a source of renewal or rupture may define the geopolitical order for decades to come.

Education's broken promises

In the grand development story of the past half-century, few achievements are cited more proudly than the expansion of schooling. Across Africa and South Asia, classrooms multiplied, enrolment surged and governments proclaimed education the ladder out of poverty. International agencies celebrated "universal access" as though the mere presence of children inside school walls constituted progress. By statistical standards, the revolution appeared complete: primary-school enrolment in many developing countries climbed above 90%, with girls increasingly represented alongside boys.

Yet beneath the triumphalism lies a devastating truth. Hundreds of millions of children can attend school for years without learning to read a simple sentence, solve basic arithmetic or acquire any skill remotely useful in a modern economy. The world succeeded in building schooling systems, but failed to build learning societies. The result is not merely educational disappointment. It is a geopolitical crisis in slow motion.

The collapse of educational quality now shapes labour markets, migration flows, ideological radicalisation and diplomatic competition. A generation armed with certificates but devoid of employable skills has become one of the defining political dangers of the twenty-first century.

For decades, international development orthodoxy measured success through inputs rather than outcomes. How many schools were built? How many girls enrolled? How many textbooks distributed? Such metrics were politically convenient because they were visible, quantifiable and photographable. Ministers could inaugurate schools; donors could issue reports; NGOs could display smiling children in uniforms.

Learning itself proved far harder to measure. The consequences are now undeniable. In many low-income countries, "learning poverty" defined as the inability to read and understand a simple text by age ten exceeds 70% and in some regions approaches 80%. Children spend years progressing automatically through grades while remaining functionally illiterate. Secondary schools graduate students who cannot compose coherent essays or perform basic calculations. Universities produce degree-holders lacking analytical ability, technical competence or fluency in global labour markets.

This is not simply a failure of pedagogy. It is a failure of statecraft. Governments expanded education systems faster than they could train teachers. Rural schools operate without electricity, libraries or qualified staff. Teachers themselves often lack mastery of the subjects they teach. In some systems, absenteeism is endemic; in others, political patronage determines hiring more than competence. National curricula, designed to imitate European standards, remain detached from local realities and economic needs. The outcome is a peculiar form of modernity: mass education without mass capability.

The crisis also reflects a deeper divide within the international development establishment. UNESCO and the World Bank, the two most influential external actors in global education policy, embody contrasting philosophies that increasingly clash.

UNESCO views education as a universal human right and cultural mission. Its approach prioritises inclusivity, citizenship, gender parity and long-term social development. It speaks the language of dignity, equality and national empowerment. UNESCO-backed programmes frequently emphasise access, cultural preservation and teacher training.

The World Bank, by contrast, treats education as an economic instrument. Its language is technocratic: human capital, productivity, labour efficiency and measurable returns on investment. Bank-funded reforms tend to favour testing regimes, accountability metrics and cost-effective scaling.

Neither approach has solved the crisis because both misunderstand part of the problem. UNESCO's rights-based vision often tolerates catastrophic quality so long as enrolment expands. A child sitting silently in a dysfunctional classroom still counts as a success in statistical reporting. Meanwhile, the

World Bank's obsession with measurable efficiency can reduce education to spreadsheets, ignoring social cohesion, identity and political legitimacy.

The rivalry between the two institutions mirrors a broader argument within development diplomacy: should education produce citizens or workers? States increasingly need both, yet many systems produce neither.

More dangerously, international funding structures often encourage governments to chase donor-friendly metrics rather than meaningful reform. Building schools is easier than reforming teacher recruitment. Expanding enrolment is politically safer than confronting corrupt examination systems. International aid can therefore unintentionally reward appearance over substance.

Education has also become an arena for geopolitical competition. In regions where state schooling fails, alternative networks rush to fill the vacuum.

China has understood this with remarkable clarity. Through Confucius Institutes, scholarship programmes and educational partnerships, Beijing presents itself as a provider of opportunity, technological modernity and disciplined state-led development.

Chinese educational diplomacy is strategic rather than charitable. It cultivates elites, shapes narratives and embeds long-term influence across Africa, Central Asia and parts of the Middle East.

Western governments frequently criticise Confucius Institutes as instruments of soft-power penetration, yet their own educational engagement has become increasingly fragmented and defensive. While Washington debates ideological influence and European governments cut development budgets, China continues building relationships through infrastructure, vocational programmes and university cooperation.

But China is not the only actor competing in the educational vacuum. Religious networks have become parallel educational systems across fragile states. In parts of the Sahel, Pakistan and Afghanistan, madrasa systems provide what governments cannot: food, shelter, identity and basic instruction. Many madrasas are peaceful and community-oriented. Some produce respected scholars and social stability where the state is absent. Yet others become pipelines for ideological militancy precisely because they offer certainty in environments defined by humiliation and unemployment.

Where secular education fails to deliver economic mobility, ideological education gains appeal. The geopolitical danger lies not in religion itself but in the convergence of despair and purposelessness. Young men with partial education, weak job prospects and fractured identities become vulnerable to movements that transform frustration into moral mission. Extremist organisations understand this better than many governments.

Nigeria illustrates the crisis with painful clarity. The country possesses Africa's largest economy and one of its youngest populations. It should be a demographic giant poised for industrial growth. Instead, it faces an educational catastrophe.

The Almajiri system in northern Nigeria symbolises the collapse of state responsibility. Millions of boys are sent away from their families to receive Islamic instruction under clerics, often surviving through street begging. Originally rooted in religious scholarship and communal care, the system deteriorated under urbanisation, poverty and state neglect. Large numbers of Almajiri children now grow up outside formal education, disconnected from economic opportunity and vulnerable to exploitation.

Boko Haram emerged partly from this landscape of abandonment. The group's infamous slogan "Western education is forbidden" was never simply a rejection of schooling. It was a rejection of a state system perceived as corrupt, exclusionary and fraudulent. Many recruits were not uneducated peasants but disillusioned young men trapped between failed modernity and religious militancy.

Northern Nigeria's tragedy demonstrates a crucial point often ignored in international discussions: poor-quality education can be more destabilising than no education at all. Expectations rise, opportunities do not, and resentment fills the gap. A diploma that leads nowhere becomes politically combustible.

If Nigeria represents educational exclusion, India's Bihar represents educational distortion. The state's infamous "exam cheating mafia" became globally notorious after images emerged of relatives scaling school walls to pass answers through windows during examinations. Yet the scandal was not merely comic dysfunction. It exposed a deeper societal pathology.

In vast parts of South Asia, educational credentials have become detached from competence. Degrees function as tickets to government jobs, social sta-

tus and marriage prospects rather than indicators of ability. Families invest enormous resources chasing certificates because bureaucratic systems reward paper qualifications above practical skill.

This has produced an industrialised culture of cheating, rote memorisation and coaching-centre dependency. Students learn how to pass exams rather than how to think. Politicians tolerate the system because educational inflation masks unemployment. Universities multiply while standards collapse.

India's broader economy remains dynamic enough to absorb some highly skilled graduates, particularly in technology sectors. But the contrast between elite excellence and mass mediocrity is widening dangerously. Islands of global competitiveness float atop oceans of educational failure.

The political consequences are profound. Large populations of semi-educated youth, aware of global inequality through smartphones and social media, increasingly perceive themselves as excluded from the prosperity they were promised. That anger rarely remains dormant.

Extremist movements flourish where aspirations collapse. Contrary to simplistic assumptions, radi-

calisation is not always driven by absolute illiteracy. Many militants possess some level of education. The danger often emerges when education raises expectations without creating opportunity. Young people become aware enough to recognise exclusion, but lack pathways to escape it.

Groups such as Boko Haram, the Taliban and ISIS-K exploit precisely this psychological terrain. They offer identity, income, structure and belonging. In some cases, they even provide more predictable advancement systems than the state itself.

A failed state school may promise citizenship while delivering humiliation. An extremist organisation may promise dignity through struggle.

The Taliban's resurgence in Afghanistan reflected not merely military endurance but the weakness of the Western-backed state-building project. Billions were spent constructing schools and universities, yet corruption hollowed out institutions. Degrees proliferated while employment stagnated. Urban educated youth often sought emigration rather than national reconstruction. Rural populations remained disconnected from the state's developmental narrative.

When education ceases to function as a bridge to prosperity, politics becomes vulnerable to absolutism.

This dynamic extends beyond terrorism. Mass educational disappointment fuels migration crises, populist politics and social fragmentation. It erodes trust in democracy itself. Citizens who perceive institutions as fraudulent become receptive to authoritarian alternatives promising order and national revival.

Amid this bleak landscape, Vietnam offers a striking counterexample. Despite far lower income levels than many middle-income states, Vietnam consistently achieves impressive results in international education assessments. Vietnamese students outperform peers from much wealthier countries in mathematics and science. The achievement is particularly remarkable given the country's modest educational spending.

Vietnam's success exposes one of the great myths of global development: that educational outcomes depend primarily on infrastructure expenditure. Teacher quality matters more than school quantity.

Vietnam invested heavily in teacher training, curriculum coherence and classroom discipline. It maintained rigorous expectations while avoiding excessive bureaucratic complexity. Education remained culturally respected, socially demanding and nationally strategic. Crucially, the system focused relentlessly on foundational literacy and numeracy before pursuing grandiose expansion.

Vietnam also aligned education with economic transformation. Manufacturing growth created tangible rewards for competence. Students could see the connection between learning and opportunity. This relationship between education and credibility is essential. Systems succeed when societies believe effort will be rewarded. Many failing states have lost precisely that belief.

The next geopolitical divide may not be between democracies and autocracies, nor between East and West, but between societies capable of converting population into productivity and those trapped in demographic disappointment.

Countries with functioning education systems will dominate advanced manufacturing, artificial intelligence, green technologies and scientific innovation.

Those without them risk permanent dependency, instability and brain drain.

Education is therefore no longer merely social policy. It is strategic infrastructure. Diplomats increasingly discuss ports, minerals and semiconductor supply chains, yet human capital may prove even more decisive. A country unable to educate its youth cannot sustain economic sovereignty. It becomes vulnerable to external influence, ideological infiltration and perpetual aid dependence.

The global education crisis also threatens international security. Fragile educational systems create fragile states. Fragile states generate insurgencies, refugee flows and transnational instability. Development failure eventually becomes everyone's problem. Yet reform requires political courage that many governments lack.

Real educational reform means confronting teacher unions when necessary, eliminating corruption in recruitment and examinations, decentralising failing bureaucracies and measuring actual learning rather than attendance. It means prioritising literacy over vanity projects and vocational competence over credential inflation. Most importantly, it means rec-

ognising that education is not about buildings. It is about capability.

The twentieth century treated schooling as a symbol of progress. The twenty-first must rediscover learning itself. The world has spent decades celebrating enrolment figures while ignoring cognitive collapse. It constructed an educational architecture obsessed with access but indifferent to mastery. In doing so, it produced millions of young people suspended between aspiration and futility.

This is not merely an economic waste. It is a moral and geopolitical failure. A child who spends ten years in school without learning to read has not been educated. He has been abandoned slowly, bureaucratically and politely. And societies that abandon their youth eventually discover that neglected classrooms become tomorrow's battlefields.

The urban volcano

In the 20th century the great geopolitical anxieties revolved around oilfields, nuclear silos and ideological blocs. In the 21st century the decisive terrain may instead be the informal settlement: the sprawling districts of corrugated iron, tangled wiring and unplanned humanity that encircle much of the developing world's great cities. Places such as Kibera, Dharavi and Orangi Town are no longer peripheral to national politics. They are becoming its centre of gravity.

By 2030, according to many urbanisation projections, a striking share of the developing world's youth population will be living in slums or slum-like conditions. This demographic transformation is not mere-

ly an economic concern. It is a geopolitical event. Governments still largely behave as though stability is maintained through military deterrence, elite bargaining and macroeconomic management. Yet the greatest threat to many states increasingly emerges from digitally connected, economically excluded urban youth whose politics are improvised in real time through smartphones.

The world is entering the age of the urban volcano: vast concentrations of underemployed young people, networked by cheap mobile internet, politically distrustful, culturally globalised and capable of erupting with little warning.

Unlike the revolutions of the Cold War era, these upheavals often lack coherent ideology, identifiable leaders or durable organisational structures. That makes them simultaneously more democratic and more dangerous. A movement without leaders is difficult to corrupt or negotiate with. It is also difficult to restrain once anger spills into the streets.

For decades policymakers assumed that rising urbanisation would produce modernisation, stronger institutions and larger middle classes. In parts of Asia this proved true. Yet across much of Africa,

South Asia and Latin America, urban growth has outpaced formal economic development. Megacities are expanding faster than states can provide housing, sanitation, transport or employment. The result is not the industrial city imagined by 20th-century development economists, but fragmented urban archipelagos where legality itself becomes uneven.

These districts are often described as "informal", a sanitised term that obscures their political significance. Slums are not merely poor neighbourhoods. They are parallel systems of governance. Water is distributed informally. Electricity is pirated. Security may be provided by gangs, militias or political patrons rather than police. In some districts the state appears mainly as a predatory force: extorting, raiding or demolishing.

That experience shapes political consciousness. A generation raised amid corruption, police violence and chronic exclusion is unlikely to trust official institutions. What it does trust is the smartphone.

The mobile phone has become the primary political institution of the urban poor. In many developing countries citizens possess no reliable access to banking, healthcare or formal employment, yet maintain

constant access to WhatsApp, TikTok, Facebook or Telegram. This inversion is historically extraordinary. Connectivity has arrived before state capacity.

That matters because digital networks allow grievances to spread faster than governments can manage them. Rumours, footage of police brutality and calls to protest can circulate through millions of people in hours. The velocity of outrage has overtaken the speed of governance.

The protests in Lagos during the #EndSARS movement revealed this new political reality. What began as anger against a notoriously abusive police unit rapidly evolved into a decentralised nationwide uprising powered by hashtags, influencer culture and mobile fundraising. Protesters coordinated supplies, legal aid and medical assistance online. Traditional political figures struggled to keep pace. The movement's energy came precisely from its lack of hierarchy.

Yet the same digital fluidity that empowers protest also enables manipulation. Foreign influence operations, criminal networks and ideological extremists exploit the same platforms. The modern slum is not isolated from global politics; it is hyperconnected to them. Narratives originating in Moscow, Beijing,

Washington, Dubai or anonymous troll farms can penetrate fragile societies instantly.

States once monopolised propaganda through television and radio. Today they compete in a chaotic information market where conspiracy theories often outperform official statements. TikTok's algorithm rewards emotional intensity rather than factual precision. WhatsApp groups transform private grievance into collective fury. Governments accustomed to censoring newspapers discover that encrypted messaging is far harder to control.

Indeed, censorship itself may accelerate instability. Internet shutdowns, increasingly popular among nervous governments, tend to confirm public suspicion that authorities are hiding abuses. They also damage already fragile urban economies dependent on mobile payments and digital commerce. The modern city cannot easily function offline.

This dynamic was evident during the protests in Colombo in 2022. What began as economic despair amid fuel shortages and inflation evolved into a broader collapse of legitimacy. Protesters occupied presidential residences not because a single opposition movement directed them, but because public

anger reached a synchronised tipping point. Social media transformed dispersed frustration into visible collective action.

The distinction between the Lagos protests and Sri Lanka's unrest is instructive. Nigeria's demonstrations centred on police violence and youth alienation. Sri Lanka's uprising emerged from economic collapse and elite mismanagement. Yet both revealed the same structural phenomenon: digitally connected populations can mobilise rapidly without formal leadership structures.

Traditional diplomacy struggles to interpret such movements because diplomatic institutions still think in terms of governments, parties and recognised opposition leaders. But who represents a protest movement assembled from millions of loosely connected users? Whom does one negotiate with when there is no central committee, no charismatic revolutionary and no coherent ideology beyond rage?

Authoritarian governments increasingly answer this question with force. Leaderless uprisings are difficult to co-opt, so states resort to surveillance, militarised policing and targeted intimidation. Artificial intelligence, facial-recognition software and predictive monitoring systems are becoming tools of urban

counterinsurgency. China's experiments in digital surveillance are studied closely by governments far beyond Asia.

Yet brute repression carries risks. Every act of police violence can become viral content within minutes. Each death becomes a symbol, each crackdown a recruitment tool. The smartphone turns state violence into political theatre consumed in real time.

This creates a paradox for fragile states. The more visibly they repress unrest, the more they may intensify the conditions for future unrest.

Some governments may attempt a hybrid approach: selective welfare combined with digital control. Subsidised food, cash transfers and transport improvements may coexist alongside aggressive online monitoring. The danger is that such strategies address symptoms rather than causes. The core problem is not merely poverty but exclusion from meaningful economic and political participation.

The geopolitics of urban unrest will increasingly shape international relations. Migration pressures, organised crime and extremist recruitment are all linked to unstable urban environments. Foreign powers may exploit unrest opportunistically, back-

ing factions or spreading disinformation to weaken rivals. Urban instability in one country can quickly spill across borders through refugee flows, arms trafficking and online contagion.

Western policymakers often discuss great-power competition in terms of naval routes or semiconductor supply chains. Yet the decisive contests of influence may instead occur in densely populated informal districts where states compete not for territory but for legitimacy.

There is also a deeper ideological dimension. Liberal democracy traditionally depends on the existence of a relatively stable middle class with long-term economic expectations. Permanent precarity undermines that social contract. Young people with little hope of formal employment or property ownership may become politically volatile not because they are ideological radicals, but because they perceive the system itself as permanently closed.

This volatility does not necessarily produce coherent revolutionary movements. More often it produces cycles of eruption and exhaustion, protests flare intensely, governments survive through repression or attrition, and underlying grievances remain un-

resolved. The political atmosphere becomes permanently combustible.

Yet fatalism would be misguided. History suggests that urban violence is not inevitable. Cities can be transformed when governments treat marginalised districts as integral parts of the urban fabric rather than security threats.

The example most frequently cited is Medellín. During the late 20th century the city was synonymous with cartel violence, inequality and fear. Rather than relying solely on policing, local authorities pursued a broader urban integration strategy. Cable cars connected isolated hillside communities to economic centres. Public libraries, schools and transport infrastructure signalled that neglected districts belonged to the city rather than existing outside it.

These interventions were not merely architectural. They were psychological and political. Infrastructure communicated dignity. Mobility created opportunity. Public spaces fostered civic identity. Young people once vulnerable to gang recruitment became commuters, students and workers with a tangible stake in stability.

The lesson is not that cable cars alone solve violence. It is that urban policy is geopolitics. Transport systems, libraries and internet access may matter as much to long-term stability as armoured vehicles or intelligence agencies.

Many governments still approach slums primarily through the lens of containment: how to police them, surveil them or demolish them. Such strategies misunderstand the scale of the demographic transition underway. When the urban poor constitute the majority of a country's youth population, marginalisation becomes national self-sabotage.

The next era of geopolitical instability may not begin with coups or interstate wars. It may begin with rising food prices, a viral video, a police shooting or a power cut in a crowded district where millions already feel abandoned. A few hashtags later, the streets fill.

The urban volcano does not erupt because people suddenly become radical. It erupts because pressure accumulates for years beneath the surface while political systems fail to adapt.

The states that survive this century's turbulence will not necessarily be the richest or most heavily armed.

They will be the ones capable of integrating vast urban populations into a functioning civic order before digital anger becomes permanent insurrection.

Gender gap as a ticking bomb

In the villages of the Sahel, young men drift through dusty streets with little to do but wait. They wait for rains that do not come, for jobs that do not exist, and for states that barely function. Thousands of miles away, across the plains of northern India and the towns of Pakistan, millions of girls hurry towards another destiny entirely, marriage before adulthood, motherhood before independence, and silence before ambition. One sex is immobilised; the other is accelerated into adulthood before it is ready. Together, they form one of the most dangerous political equations of the 21st century.

Demography has long fascinated strategists. Population growth once inspired fears of famine; ageing societies now inspire fears of decline. Yet the most

combustible demographic phenomenon today is not simply population growth, but gender imbalance within youthful societies. Across large parts of Africa and South Asia, governments confront a dual crisis: vast numbers of undereducated young men detached from productive work, alongside vast numbers of girls denied education and economic agency. This is not merely a social injustice. It is a geopolitical threat.

The world's diplomats still speak about terrorism, migration and state fragility as though they are separate phenomena. Increasingly, they are symptoms of the same underlying condition. Societies that fail to integrate young men economically while simultaneously suppressing women politically create the perfect incubators for unrest. Idleness and patriarchy reinforce one another. Where girls are denied opportunity, fertility rates remain high. Where fertility remains high, states struggle to educate and employ swelling youth populations. Where young men cannot find dignity through work or status through achievement, many seek it through violence, militancy or hyper-nationalism.

The Sahel illustrates this vicious cycle with alarming clarity. From Mali to Niger and Burkina Faso, some regions now contain enormous cohorts of

young men with little access to formal employment. Climate shocks and weak governance have destroyed traditional livelihoods faster than modern economies can replace them. Extremist groups understand this arithmetic better than many foreign ministries. Jihadist recruiters rarely promise ideology first; they promise salaries, belonging and masculine purpose. In villages abandoned by the state, militias often become the nearest approximation of employment.

Western officials often frame the Sahel's instability primarily through the lens of counter-terrorism. Yet the deeper crisis is demographic governance. Security operations may kill insurgents, but they do not alter the structural imbalance between frustrated young men and constrained women. Without social transformation, military victories become temporary pauses between insurgencies.

South Asia presents a different variation of the same pathology. In northern India and Pakistan, millions of girls still leave school prematurely due to social pressure, poverty or fears regarding family "honour". Child marriage remains stubbornly resilient in many rural areas. At the same time, economic growth has failed to generate enough quality employment for young men entering adulthood. This combination

produces a peculiar and unstable social order: men expected to embody patriarchal authority without possessing the economic foundations traditionally associated with it.

Historically, patriarchy rested partly upon an economic bargain. Men provided income and protection; women exchanged autonomy for security within the household. But modern economies have weakened this arrangement. Urbanisation, automation and informal labour markets have eroded male earning power across much of the developing world. Yet social expectations remain unchanged. The result is a generation of young men caught between fading patriarchal privilege and economic impotence.

This helps explain why gender politics increasingly shape political radicalisation. Male frustration in many societies is no longer purely economic; it is psychological. Young men who feel excluded from prosperity often cling more aggressively to social dominance over women. Politicians exploit these anxieties with remarkable effectiveness. Whether through religious extremism, ethnic nationalism or "traditional values", many movements now offer disillusioned men a substitute identity rooted in control rather than achievement.

The Taliban understand this instinct intimately. Their ban on girls' secondary education is often interpreted abroad as ideological fanaticism alone. It is that, certainly. But it is also a brutal form of social management. Educated women alter labour markets, marriage patterns and power structures. They threaten male monopolies in deeply conservative societies. By excluding girls from education, the Taliban are not merely policing morality; they are freezing Afghanistan's social hierarchy in place.

The consequences will reverberate far beyond Afghanistan's borders. Denying girls education does not preserve stability; it destroys it slowly. Countries where women remain economically dependent tend to sustain higher fertility rates, weaker household incomes and poorer health outcomes. Large families dilute investment per child, especially for boys already struggling to find opportunities. Over time, this creates precisely the kind of alienated youth bulge associated with chronic instability.

Demographers and political scientists increasingly converge on a stark finding: youthful populations are not inherently dangerous, but uneducated youthful populations often are. Countries with large cohorts of poorly educated young men face dramatically

higher risks of civil conflict. The relationship is not deterministic, yet the correlation is too persistent to ignore. A surplus of frustrated young males has historically acted as fuel for militias, gangs and revolutionary movements alike.

By contrast, educating girls generates effects that ripple across generations. Women who complete secondary school marry later, have fewer children and invest more heavily in each child's health and education. Fertility declines not because of coercion, but because aspirations expand. The economic implications are enormous. Economists have long described the "demographic dividend": the growth boost that occurs when working-age populations expand relative to dependents. Yet this dividend is conditional. It materialises only when societies educate and employ their populations productively.

Girls' education doubles the potential of that dividend. A society that sidelines half its workforce cripples itself before competition even begins. The evidence is visible everywhere. Countries that integrated women into manufacturing and services experienced not merely faster growth, but often greater political moderation.

Bangladesh offers perhaps the clearest example. Once dismissed as a hopeless case of poverty and overpopulation, it transformed itself over several decades through a combination of female garment employment, microfinance and investment in girls' education. Millions of rural women entered the workforce. Fertility rates collapsed. Household incomes rose. Extremist movements lost social ground in many areas not because ideology vanished, but because economic pathways expanded.

This transformation was imperfect. Bangladesh's garment industry remains exploitative in many respects, and labour rights are fragile. Yet geopolitically, the lesson is unmistakable. Female economic empowerment can stabilise societies more effectively than endless security assistance. Development and security are not separate domains. They are often the same struggle viewed through different bureaucratic lenses.

International diplomacy, however, still treats gender issues as peripheral. Women's education is too often discussed as a humanitarian concern rather than a strategic necessity. Development agencies may champion girls' schooling while defence ministries focus separately on insurgency and migration.

In reality, these are interconnected theatres of policy failure.

The United Nations Population Fund and similar organisations understand parts of this puzzle. Their programmes on reproductive health, girls' education and maternal care aim to slow unsustainable demographic pressures while increasing female autonomy. Yet such initiatives routinely collide with entrenched local patriarchies. In many societies, international advocacy for women's rights is portrayed as cultural imperialism. Local elites often resist reform not merely out of conservatism, but because gender hierarchy remains central to political authority.

This creates a profound dilemma for diplomacy. Western governments increasingly recognise that empowering women contributes to stability. Yet overt external pressure can provoke nationalist backlash, especially in post-colonial societies sensitive to foreign interference. The challenge is therefore not simply moral persuasion, but institutional patience: building coalitions with local reformers, religious leaders and businesses capable of shifting incentives gradually from within.

Some countries demonstrate that change is possible even under difficult conditions. Rwanda, despite

its authoritarian tendencies, offers a striking contrast within Africa. Its female-majority parliament is not merely symbolic theatre. Women have become deeply embedded in local governance and post-conflict reconstruction. Rwanda's lower levels of youth violence compared with several neighbouring states cannot be explained by gender inclusion alone, but female political participation has undeniably altered governance priorities towards education, healthcare and community stability.

Pakistan presents the opposite warning. "Honour" killings remain a grotesque manifestation of patriarchal control. Such violence is often interpreted narrowly as cultural barbarism. In reality, it also reflects profound insecurity within rapidly changing societies. Families fearful of losing social status police women's behaviour with lethal intensity precisely because traditional authority structures are weakening elsewhere. Patriarchy becomes harsher when it senses decline.

The geopolitical implications extend far beyond domestic stability. Migration pressures, extremist recruitment and regional conflict all intensify when youthful populations lack opportunity. Europe's migration debates are, in part, demographic aftershocks

from Africa and the Middle East. Gulf economies increasingly rely upon importing labour because their own demographic structures cannot sustain growth. China worries about ageing; much of Africa worries about youth explosion. The international system is being reshaped by contrasting demographic trajectories.

Yet policymakers still underestimate the emotional dimension of this crisis. Development statistics obscure the lived reality of millions of young men trapped between expectation and irrelevance. In traditional societies, masculine identity is often tied to marriage, provision and authority. Without employment, these milestones become unreachable. Delayed adulthood breeds resentment. Social media worsens the effect by exposing unemployed youth to unattainable lifestyles and global inequalities in real time.

At the same moment, millions of young women are becoming more aware of alternatives. Even in conservative societies, mobile phones and cheap internet access expose girls to lives beyond domestic confinement. Expectations rise faster than institutions adapt. This creates tension within households, villages and political systems. Restless girls and idle

boys are not separate phenomena. They are twin products of uneven modernisation.

The danger is not simply violence, though violence remains a real possibility. The deeper danger is democratic erosion. Governments facing frustrated male populations often resort to nationalism, militarisation or moral policing to redirect anger outward. Gender repression becomes politically useful. Women's autonomy is sacrificed to preserve social cohesion among insecure men.

This pattern is visible from Kabul to parts of India, from the Sahel to sections of the Arab world. Leaders invoke civilisation, religion or tradition while avoiding the harder task of generating jobs and reforming education. Patriarchy becomes a substitute for governance.

No diplomatic summit can solve this quickly. Demographic transitions unfold across decades. But governments and international institutions must recognise that gender equality is not a fashionable add-on to development policy; it is central to geopolitical stability. Every year a girl remains in secondary school reduces the probability of future crisis. Every year a young man spends unemployed and excluded increases it.

The 21st century's defining security challenge may not be a clash between great powers alone, but the management of youthful societies trapped between old hierarchies and modern aspirations. Countries that educate girls, integrate women economically and create dignified work for young men will harvest prosperity and resilience. Those that fail may find themselves governed increasingly by anger, militancy and fear. The ticking bomb is not population itself. It is wasted human potential divided by gender.

Can migration save the bulge?

In the villages of Nepal, migration has become less a choice than a rite of passage. Young men queue at recruitment agencies in Kathmandu clutching passports and borrowed money, preparing for lives in Qatar, Saudi Arabia or Malaysia. In Zimbabwe, hospitals lose nurses faster than they can train them. Across West Africa, parents save not for university but for a smuggler's fee to Europe. And from Manila to Mogadishu, governments quietly rely on a river of foreign earnings that now props up entire national economies.

The 21st century's great demographic divide is no longer between capitalism and socialism, nor even democracy and authoritarianism. It is between countries growing old and countries growing young.

Europe, East Asia and the Gulf face labour shortages, ageing populations and rising pension burdens. Africa and South Asia, meanwhile, are experiencing a youth bulge unprecedented in human history. Hundreds of millions of young people will enter labour markets that cannot possibly absorb them.

Migration, therefore, has become one of the defining geopolitical forces of the age. Not war, not ideology, but labour mobility.

And money follows people. Remittances to Africa now exceed $100bn annually, while South Asia receives around $180bn. Together, these flows surpass foreign direct investment and development aid combined. In many poor countries, remittances are the real central bank reserve, the true welfare system and the invisible infrastructure holding fragile states together.

Yet this global remittance economy poses an uncomfortable question: are poorer nations exporting workers because migration is a path to development, or because they have abandoned the hope of developing at home?

Colonial empires once extracted gold, rubber and oil. Modern globalisation increasingly extracts la-

bour. The Gulf monarchies perfected this model. The glittering skylines of Dubai, Doha and Riyadh were not built by local citizens but by armies of imported South Asian workers. Under the Kafala sponsorship system, millions of migrants remain legally tethered to employers who control their visas, movement and often their freedom itself. Passports are confiscated. Wages delayed. Workers housed in camps invisible to tourists sipping coffee beneath luxury towers.

The Gulf states insist reforms are under way, and some improvements have indeed occurred under international pressure, particularly after scrutiny surrounding the World Cup in Qatar. Yet the fundamental imbalance remains unchanged: labour-rich countries export desperation; labour-poor states import obedience.

For governments in Nepal, Bangladesh and Pakistan, the arrangement is simultaneously humiliating and indispensable. Remittances stabilise currencies, reduce unemployment and ease political pressure. Every departing worker is one fewer angry young man at home.

Nepal offers perhaps the clearest example of the "labour migrant state". Roughly 1,000 Nepalis leave the country daily for overseas employment. Entire

rural economies depend on Gulf wages. New houses rise in villages not because of domestic productivity but because sons are pouring concrete in Abu Dhabi. This has created a strange economic inversion. The country's most successful export is not a product but its people.

Europe's response to migration reveals its own strategic incoherence. The continent faces demographic decline severe enough to threaten economic growth and welfare systems. Germany, Italy and much of Eastern Europe are ageing rapidly. Industries from agriculture to elder care already depend on migrant labour.

Yet European politics treats migration primarily as a security threat rather than an economic necessity. Legal pathways for African migrants remain astonishingly narrow relative to demographic reality. Europe simultaneously needs workers and fears voters who oppose immigration. The result is hypocrisy bordering on absurdity: economies quietly reliant on undocumented labour while governments publicly promise crackdowns.

This contradiction has handed leverage to smugglers, traffickers and authoritarian transit states. Libya's militias, Tunisia's coastguard and Turkey's gov-

ernment all understand that migration pressure can be weaponised diplomatically. Europe has effectively outsourced border control to unstable regimes while refusing to build a coherent labour migration system.

For African governments, the message is equally corrosive. Europe lectures about governance and anti-corruption while absorbing the continent's most ambitious youth through irregular channels. A Senegalese engineer or Nigerian doctor often concludes, rationally, that the quickest route to prosperity lies not through national development but emigration. The politics of resentment follow naturally. Young Africans see Europe as simultaneously closed, dependent and morally inconsistent.

Economists tend to celebrate remittances because they reduce poverty directly. Unlike aid, the money goes straight to households. Families invest in education, housing and healthcare. Villages gain resilience against shocks. Children eat better because an uncle drives a taxi in Dubai.

All true. But remittance economies also create long-term distortions that development agencies are often reluctant to acknowledge.

First comes dependency. Governments receiving vast remittance inflows face weaker incentives to build productive domestic industries. Consumption rises without corresponding industrialisation. Imports surge. Property prices inflate. Economies drift towards a strange equilibrium where labour export becomes the national business model.

Second comes social fragmentation. Entire generations grow up with absent parents. In parts of South Asia, "Gulf children" are raised largely by grandparents while fathers spend years abroad. Marriages strain under distance. Communities hollow out as the young depart.

Then comes the most damaging consequence of all, the loss of skilled labour. Zimbabwe illustrates the catastrophe starkly. Years of economic collapse and political dysfunction triggered a mass exodus of doctors, nurses and teachers. South Africa, Britain and Australia benefited from an influx of highly trained Zimbabweans. Zimbabwe itself inherited understaffed hospitals and deteriorating public services.

This is the hidden subsidy embedded in migration. Poor countries educate workers whom rich countries

then employ. Britain's NHS depends heavily on foreign-born medical staff. So do Gulf hospitals. So do care homes across Europe. Wealthier states save billions in training costs while poorer states lose human capital they can scarcely afford to spare.

The morality is murky. Individuals have every right to seek better lives. Yet collectively, the system entrenches inequality. The global South finances the labour shortages of the global North.

For many governments, however, migration serves an immediate political purpose: it prevents unrest. Youth unemployment is among the most destabilising forces in politics. The Arab Spring demonstrated how quickly economic frustration can mutate into revolution. African governments understand the danger acutely. By 2050, Africa's population will nearly double. Creating sufficient jobs domestically may prove impossible.

Migration therefore functions as a safety valve. This helps explain why some governments quietly encourage outward migration even while lamenting brain drain publicly. Labour export reduces pressure on urban economies, lowers unemployment statistics and injects foreign currency into fragile financial systems.

In effect, remittances have become a substitute for development strategy. Yet such dependence is perilous. Host countries can alter visa policies abruptly. Economic downturns in the Gulf reverberate across villages thousands of miles away. Deportations become geopolitical tools. A nation dependent on foreign labour markets forfeits part of its sovereignty.

COVID-19 exposed this vulnerability brutally. Migrant workers were dismissed en masse, stranded without income and repatriated to economies incapable of absorbing them. Remittance flows initially dipped, revealing how precariously entire countries depended on external demand for labour.

Few countries embraced labour export more systematically than the Philippines. For decades, Filipino workers have staffed ships, hospitals, hotels and homes across the world. Overseas Filipino Workers became national heroes, celebrated as economic lifelines.

But the Philippines eventually recognised a crucial truth, remittances alone do not create sustainable prosperity. The country began cultivating what it called balikbayan programmes, initiatives encouraging returning migrants and diaspora communities to invest, start businesses and transfer skills back home.

The objective shifted from merely exporting workers to leveraging a global diaspora network.

This distinction matters enormously. A remittance economy consumes foreign earnings. A diaspora strategy converts migration into capital accumulation, knowledge transfer and political influence.

India has partially mastered this approach. Its diaspora became embedded in Silicon Valley, global finance and academia. Overseas Indians helped channel investment and technological expertise back into the country. Migration evolved from escape route into geopolitical asset.

Africa has yet to harness its diaspora on a comparable scale, though examples are emerging in Nigeria, Kenya and Rwanda. The challenge is institutional. Diaspora investors require trust, stable governance and credible financial systems. Sentiment alone does not build factories.

The current global migration order is unsustainable because it rests on denial. Rich countries deny their dependence on migrant labour. Poor countries deny the long-term damage of labour export dependency. Everyone benefits in the short term; few plan strategically for the future.

A more rational system would acknowledge migration as an inevitable component of demographic imbalance rather than an emergency to suppress.

This would require legal labour pathways scaled to economic reality, particularly between Europe and Africa. It would require enforceable protections against exploitation in Gulf states. It would require compensation mechanisms for countries losing critical professionals such as doctors and engineers.

Most importantly, it would require developing countries to treat migration not as an end state but as a transitional tool.

No nation ever became prosperous simply by exporting its workforce indefinitely. Remittances can alleviate poverty, but they cannot substitute for industrial policy, functioning institutions or domestic job creation. Eventually, countries must create economies people wish to stay in.

The deeper irony is that the global South's greatest asset is precisely the thing it keeps exporting: its youth. Africa's demographic boom is often portrayed as a looming crisis. It could equally become the century's greatest economic opportunity. But only if those young people build productive futures at home

rather than permanently servicing ageing societies abroad.

Migration can buy time. It can relieve pressure. It can enrich families and stabilise states. But it cannot, by itself, save the bulge.

The unlikely success stories

For decades, the language of development has oscillated between fatalism and fashion. One decade blames geography; another blames colonialism. Some analysts invoke culture, others institutions, others commodities, others sheer luck. Yet amid the noise, a handful of societies quietly achieved outcomes that conventional wisdom insisted were improbable.

How did a poor Indian state achieve European-level literacy and below-replacement fertility before it became wealthy? Why did a West African country surrounded by coups and insurgencies largely pre-

serve constitutional order? How did a small island state, long mired in ethnic conflict and political dysfunction, nonetheless build one of the most educated and healthiest populations in the developing world?

The stories of Kerala, Senegal and Sri Lanka are not tales of perfection. Each carries deep contradictions and serious failures. Sri Lanka suffered economic collapse in 2022. Senegal now faces rising democratic strain. Kerala struggles with unemployment and ageing. Yet all three demonstrate an unfashionable truth in geopolitics: development is not merely the consequence of prosperity. Often, it is the cause of it.

In an era obsessed with grand strategy, military competition and technological supremacy, policymakers frequently overlook the mundane machinery that determines whether states become stable, productive and governable. Fertility clinics matter. Rural schools matter. Vaccination drives matter. Land reform matters. Apprenticeships matter. Above all, the political decision to treat ordinary citizens as assets rather than burdens matters.

Demography is not destiny. Governance is. Kerala's Quiet Revolution

Among development economists, Kerala has long occupied an awkward place. By the standards of India's poorer states, it should not have succeeded. It possessed few major industries, limited mineral wealth and relatively modest income levels for much of the post-independence period. Yet by the late 20th century it had achieved social indicators that rivalled middle-income countries.

Literacy became nearly universal. Infant mortality plummeted. Female education surged. Fertility rates collapsed below replacement level. Life expectancy climbed dramatically. All this occurred before Kerala became substantially richer.

This inverted the standard assumption that social development naturally follows economic growth. In Kerala, the sequence ran in reverse.

The roots of this transformation stretch back to a peculiar convergence of political forces. Christian missionaries expanded schooling. Reformist Hindu movements challenged caste hierarchies. Communist governments pursued aggressive redistribution and mass education. Land reforms weakened feudal structures that had trapped agricultural labourers in hereditary dependence. Public-health campaigns

penetrated deep into villages. Crucially, women entered education at scale.

Perhaps the most consequential policy, however, was astonishingly simple: universal access to contraception and reproductive healthcare beginning in the 1960s.

This mattered not merely because fertility declined, but because the timing changed everything. Smaller family sizes allowed households to invest more heavily in each child's education and nutrition. Women gained greater autonomy and labour-market participation. Public services became more manageable. Population growth slowed before urban overcrowding and youth unemployment became politically explosive.

Kerala's later economic gains were built upon this foundation of human capital. The Gulf migration boom, which channelled remittances back into the state from the 1970s onwards, would likely have produced far weaker results had the population remained largely illiterate and trapped in high fertility.

The lesson is deeply inconvenient for many governments. Human development is not a luxury good

purchased after industrialisation. It is often the precondition for sustainable industrialisation itself.

Too many states still approach women's education, reproductive healthcare and primary schooling as secondary concerns compared with infrastructure, military expenditure or prestige megaprojects. Kerala suggests the reverse hierarchy may be wiser. A literate mother is infrastructure.

West Africa's post-colonial history has been punctuated by military coups, insurgencies and state collapse. Mali, Guinea, Burkina Faso and Niger have all experienced repeated constitutional breakdowns. Jihadist violence has spread across the Sahel with alarming speed. External powers, from France to Russia, have competed for influence amid weakening institutions.

Senegal, though hardly immune to instability, remained an outlier for decades. This resilience cannot be explained simply by economic success. Senegal is not especially rich. Nor does it possess particularly formidable security forces. Its political class is often fractious and patronage-heavy. Yet the state repeatedly avoided the total institutional disintegration seen elsewhere in the region.

Part of the explanation lies in the country's Sufi brotherhoods. To many Western observers, religious networks appear inherently destabilising. In Senegal, they often served the opposite function. Brotherhoods such as the Mourides and Tijaniyya created dense webs of social trust linking urban politicians, rural communities and commercial networks. They acted as mediators between state and society, absorbing tensions that might otherwise have erupted violently.

These organisations also embedded norms of gradualism and negotiation. Political competition became intense but rarely existential. Elites generally calculated that compromise was preferable to chaos.

Equally important was Senegal's long tradition of youth apprenticeships and informal economic integration. While the country struggled to create enough formal employment, many young people nonetheless remained tied to networks of work, mentorship and social belonging.

This matters enormously. Across fragile states, the most dangerous demographic is not merely "young men". It is socially detached young men: unemployed, uprooted, politically alienated and disconnected from communal institutions. Such populations be-

come fertile recruiting grounds for militias, criminal organisations and extremist movements.

Senegal never eliminated poverty. It did, however, preserve enough social cohesion to prevent large-scale atomisation.

Western policymakers often discuss African governance almost exclusively through the language of elections, constitutions and security partnerships. These matter. But they are insufficient. States endure not simply because citizens fear them, but because citizens remain socially embedded within them.

A society with functioning communal networks can survive weak bureaucracy. A society without them may collapse despite receiving billions in foreign assistance.

Sri Lanka presents perhaps the most tragic example of developmental paradox. For decades, the island maintained some of the best human-development indicators in South Asia. Free education and universal healthcare produced high literacy, strong life expectancy and a remarkably skilled population relative to national income. Even during periods of civil war, the state continued to invest heavily in social services.

The country's hospitals reached deep into rural areas. Schooling became widely accessible. Women achieved comparatively strong educational outcomes. The state built human capital long before the phrase became fashionable among international consultants.

Yet Sri Lanka simultaneously descended into ethnic conflict, authoritarian tendencies and eventually catastrophic economic mismanagement. The 2022 financial collapse exposed profound structural weaknesses: unsustainable debt, poor governance, ill-judged tax cuts and overreliance on tourism and external financing. The sight of citizens storming the presidential palace shattered the image of competence that had long surrounded the state.

And yet the collapse itself revealed another truth, societies with high human capital possess extraordinary resilience. Sri Lanka did not descend into total disorder. Institutions bent but did not entirely break. The population remained highly educated, politically engaged and administratively capable. Recovery, though painful, proved possible precisely because earlier investments in health and education had created a capable society beneath the wreckage of elite failure.

Human capital cannot prevent every crisis. But it increases a nation's capacity to survive them. This distinction is increasingly important in an age of climate shocks, debt instability and geopolitical fragmentation. The states most likely to endure future turbulence may not necessarily be those with the highest GDP growth today, but those with the healthiest, best-educated and most adaptable populations.

Modern geopolitical discourse often drifts toward determinism. Africa is portrayed as permanently unstable. South Asia is framed as hopelessly overpopulated. Ageing societies are described as doomed to stagnation. Young societies are said to face inevitable unrest.

Reality is less tidy. Kerala demonstrates that fertility transitions can occur rapidly without prior mass prosperity. Senegal shows that social institutions matter as much as military capacity. Sri Lanka proves that public goods can coexist with political dysfunction and can outlast it.

The deeper lesson is that policy choices accumulate over decades in ways elites often fail to appreciate. Universal contraception access in Kerala during the 1960s seemed mundane at the time. So did free rural schooling in Sri Lanka. So did Senegal's preservation

of religious and communal mediation structures. Yet these decisions shaped demographic behaviour, state legitimacy and social resilience for generations.

Meanwhile, many countries that pursued more glamorous strategies fared worse. Military modernisation without education produced brittle states. Rapid urbanisation without employment generated instability. Commodity booms without redistribution deepened inequality. Debt-fuelled infrastructure without institutional reform created fragile growth.

The world's development conversation still suffers from a bias towards spectacle. Governments announce billion-dollar investment corridors while neglecting primary healthcare clinics. International summits celebrate artificial intelligence while millions of girls remain outside formal education. Politicians chase "national champions" while allowing local manufacturing ecosystems to wither.

Yet history repeatedly suggests that stable prosperity emerges less from dramatic breakthroughs than from cumulative social investment. Literacy compounds. Public health compounds. Female empowerment compounds. Institutional trust compounds. So does neglect.

The next half-century will intensify these questions. Many rich societies face ageing populations and labour shortages. Large parts of Africa and South Asia remain extraordinarily young. Climate migration will place immense pressure on cities and borders. Artificial intelligence may eliminate vast numbers of low-skill jobs before poorer states fully industrialise.

Under such conditions, simplistic demographic narratives become dangerous. A youthful population can become either an engine of growth or a reservoir of instability. An ageing society can become either innovative and productive or stagnant and fiscally paralysed. Outcomes depend less on demographic structure alone than on institutional preparation.

Kerala prepared early. Senegal preserved social cohesion. Sri Lanka invested heavily in citizens before prosperity fully arrived.

These are not universal models. Kerala's politics cannot simply be transplanted to Nigeria. Senegal's Sufi networks are historically specific. Sri Lanka's welfare state emerged from particular colonial and post-colonial dynamics.

But the underlying principle travels remarkably well: states succeed when they increase the capability

of ordinary people long before macroeconomic statistics improve. Development, in other words, is not primarily about enriching nations. It is about equipping citizens.

Great powers routinely underestimate this. China's Belt and Road Initiative transformed infrastructure across much of the developing world, yet often neglected local institutional capacity. Western powers spent two decades conducting counterterrorism operations across the Sahel while paying comparatively little attention to governance and social cohesion. Gulf states invested heavily in prestige urbanism while relying on imported labour and uneven educational systems.

Hard power remains necessary. Geography still matters. Economic scale still matters. But the endurance of states increasingly depends upon softer variables that are harder to quantify: trust, literacy, healthcare access, gender inclusion and social legitimacy.

These factors rarely dominate diplomatic summits because they lack theatrical appeal. There are no triumphant photographs for successful vaccination campaigns or declining fertility rates. No missile parade celebrates competent local administration.

Yet these quiet achievements often shape history more profoundly than military procurement contracts. The 21st century's most successful states may not necessarily be the richest or the strongest. They may simply be the ones that understood earliest that human beings are the decisive strategic resource.

Kerala understood it. Senegal partially understood it. Sri Lanka, despite all its mistakes, understood it too. Much of the world still does not.

China and India's game

In geopolitics, demography is often treated as background noise, an inert statistic behind the "real" forces of strategy, technology and statecraft. Yet every so often it becomes the plot itself. The rivalry between India and China is approaching such a moment. One is ageing at speed, the other is still young but unevenly so. The question is no longer simply which economy grows faster, but which society can productively absorb—or waste—its next billion working-age citizens.

At first glance, the contrast is stark enough to resemble a policy presentation slide. India's median age is around 28; China's is closer to 39 and rising. Over the next two decades, India is expected to add

roughly 200 million workers, while China may lose around 100 million from its labour force. These are not marginal adjustments. They are structural shifts on a civilizational scale.

But demographics do not automatically translate into power. They must be converted through institutions, investment and political stability. And this is where the story becomes more contested.

India's youth bulge is often described as a "dividend", but dividends are only paid when capital is invested wisely. The country's challenge is not a shortage of young people entering the labour market, but a shortage of productive jobs capable of absorbing them at scale. Its celebrated digital public infrastructure, identity systems, payment rails, and increasingly sophisticated fintech ecosystems, has created an impression of leapfrogging modernity. It is indeed a powerful state capacity tool. Yet digital services alone cannot absorb hundreds of millions of entrants into the workforce.

The risk is a dual economy: a thin layer of high-productivity digital and service jobs sitting atop a vast informal sector that continues to underemploy young workers. In such a scenario, demographic advantage becomes social pressure. Historically, youth

bulges that fail to find productive employment have correlated not only with slower growth but also with political volatility.

China's challenge is the mirror image. It has already enjoyed its demographic dividend. Between the 1980s and 2010s, it converted a vast rural workforce into an urban industrial engine at unprecedented speed. That era is now closing. The workforce is shrinking, dependency ratios are rising, and the state is confronting the fiscal consequences of ageing before fully transitioning into a high-income consumption-led economy.

The response has been to automate aggressively and to move up the value chain into advanced manufacturing, electric vehicles, and high-end technology. But there is an uncomfortable asymmetry: productivity gains must now offset labour decline rather than complement labour abundance.

Where the two trajectories intersect is in external strategy. Beijing's Belt and Road Initiative (BRI) has, in part, functioned as a geopolitical extension of its domestic economic transition. Infrastructure projects abroad employ young labour in partner states and sustain Chinese industrial capacity. In countries such as Pakistan, where over 60% of the population

is under 30, the promise of Chinese-backed employment and infrastructure acts as both stabiliser and dependency mechanism.

Yet this model carries latent fragility. Youth-heavy societies are not inherently unstable, but they are sensitive to cycles of expectation and disappointment. If infrastructure corridors do not translate into durable employment ecosystems, the result can be a familiar pattern: political disillusionment, migration pressures, and in some cases the emergence of insurgent networks.

Pakistan sits at the centre of this demographic-geopolitical tension. It is neither large enough to absorb youth unemployment domestically at scale nor stable enough to guarantee that external investment will automatically translate into broad-based growth. The strategic concern is not simply alignment with China, but whether demographic pressure becomes a systemic security issue across South Asia.

Beyond South Asia, China has also extended labour-intensive and infrastructure-linked investment into parts of Africa, where it encounters a continent that is, in aggregate, even younger than India. In theory, this offers a mutually reinforcing arrangement: Chinese capital and expertise meeting African la-

bour supply. In practice, however, the equation depends on whether industrial ecosystems can localise rather than simply extract.

Historical comparison offers limited guidance, but Japan provides a useful cautionary tale in reverse. Its post-war "miracle" was underpinned by a demographic sweet spot: a young, disciplined workforce, rapid urbanisation, and a state capable of coordinating industrial policy with export competitiveness. Crucially, Japan grew before it aged.

Neither China nor India fits this sequence neatly. China grew first and is now ageing; India is young but still struggles to achieve the manufacturing intensity that defined East Asian developmental success. The lesson is not that one model will be repeated, but that timing is everything. Demographic advantage is perishable.

One plausible future is a managed convergence: India successfully reforms labour markets, improves educational outcomes, and expands export-oriented manufacturing, while China transitions smoothly into a high-productivity, innovation-led economy. In this scenario, Asia becomes a bipolar system of two complementary giants, with stable but competitive coexistence.

A second, more fragmented outcome is already visible in outline. India grows unevenly, creating islands of prosperity but failing to fully absorb its youth cohort. China continues to rise technologically but struggles with internal consumption constraints and demographic drag. The result is a region of high growth volatility, where neither power fully dominates but both experience internal strain.

The third scenario is the most destabilising: youth surpluses in multiple regions intersect with weak job creation, particularly across parts of South Asia and Africa. Migration pressures increase, informal economies expand, and political systems are forced into reactive, often securitised responses. In this world, demographic advantage becomes geopolitical risk.

It is tempting to frame the China–India dynamic as a binary contest for primacy. But the more consequential competition may be internal rather than external: between each state and its ability to convert demographic structure into economic productivity.

China's question is whether it can become old and rich simultaneously without stalling. India's is whether it can become rich before it becomes old. The answer to both will depend less on rivalry and more on governance: education systems that actually translate

into skills, labour markets that formalise rather than exclude, and states that can absorb social expectations without repression or stagnation. Demography does not dictate destiny. But it does set deadlines.

The resource curse's second act

In the classic telling, the resource curse is a macroeconomic affliction: oil or minerals distort exchange rates, inflate public sectors, and entrench corruption. But in its second act, the curse has become more demographic than fiscal. Across resource-rich states from Nigeria to the Democratic Republic of Congo, from Angola to Papua New Guinea, the central political problem is no longer simply how to manage wealth, but how to manage the absence of opportunity for those born into it.

The defining feature of these economies is no longer resource abundance alone, but youth exclusion at scale. In countries where median ages are under 20 or barely above, natural wealth has not translated into employment pipelines. Instead, it has created enclaves of capital-intensive extraction surrounded by vast labour-surplus societies. Oil flows, copper is mined, cobalt is shipped, yet for millions of young people, the only growth sector is political grievance.

Nowhere is this contradiction more visible than in Nigeria's Niger Delta. Despite decades of oil revenues amounting to hundreds of billions of dollars, the region remains a patchwork of environmental degradation and underemployment. Militancy there is often described as criminality or insurgency, but its deeper logic is economic substitution. Where formal employment fails, armed groups become informal employers. They offer income, status and a sense of agency in an economy that otherwise withholds all three. In effect, the state's failure to convert resource wealth into broad-based labour demand has created a parallel labour market in violence.

A similar pattern is emerging in South Sudan, where ethnic militias are increasingly composed of men in their late teens and twenties. These are not

ideological armies in any classical sense; they are age-structured economies of survival. In societies where cattle wealth has been eroded by conflict and climate stress, and where state institutions are embryonic or predatory, the gun has become both capital and credential. Youth cohorts are not merely at risk of instability; they are structurally recruited into it.

The Democratic Republic of Congo illustrates the global dimension of this dynamic. The green energy transition has intensified demand for cobalt, a mineral essential to batteries powering electric vehicles and renewable grids. Yet the extraction of cobalt is deeply embedded in informal and often exploitative labour systems. In parts of the country, artisanal mining sites function as de facto labour reservoirs for adolescents and young men with few alternatives. Reports of child labour persist not as anomalies but as symptoms of a broader system in which global demand outpaces domestic governance capacity. The paradox is stark: minerals extracted to enable a low-carbon future are, in some locations, sustained by high social cost and low human capital investment.

Zimbabwe's lithium boom presents a similar tension. As global supply chains diversify away from China, lithium-rich regions in Africa are being rapidly integrated into strategic commodity networks. Yet the speed of extraction frequently exceeds the speed of institutional development. Where regulation is weak, informal labour systems proliferate, and where youth unemployment is already high, mining becomes both opportunity and trap. The result is not development in the classic sense but a compressed cycle of extraction and social fatigue.

Papua New Guinea, often absent from African-centred resource curse narratives, demonstrates that this is not a regional pathology but a structural one. Its liquefied natural gas revenues have generated enclave prosperity, but the broader economy remains fragmented, with limited absorption of young labour into productive sectors. Geography compounds governance constraints, but the underlying pattern is familiar: capital-intensive extraction coexisting with labour-intensive exclusion.

The geopolitical dimension of this second act of the resource curse is increasingly difficult to ignore. Western economies, pursuing decarbonisation, have created unprecedented demand for transition miner-

als. This has effectively revalued geological deposits in politically fragile states. Yet the governance frameworks surrounding these supply chains remain underdeveloped. The result is a structural asymmetry: demand is global and urgent, while regulation is local and weak.

In this gap, labour practices degrade. Not necessarily because of malice, but because of incentive structures. Where mineral rents are high and labour is abundant, the economic logic favours minimising costs, including social ones. Youth, in particular, become a flexible input rather than a protected constituency. The language of "critical minerals" in Western capitals rarely aligns with the lived reality of "survival labour" in extraction zones.

This disconnect feeds back into domestic politics. Resource wealth, rather than integrating young populations into formal economies, often funds exclusionary patronage networks. Infrastructure projects and sovereign wealth funds may expand headline GDP, but they frequently bypass the demographic majority. In such conditions, political legitimacy becomes increasingly transactional and increasingly brittle.

The Niger Delta militancy of past decades is often treated as a resolved episode, contained through amnesty programmes and revenue-sharing arrangements. But its underlying demographic drivers were never fully addressed. They have instead migrated, mutated, and in some cases intensified in other resource frontiers. South Sudan's armed youth groups are not an exception; they are a continuation of a pattern in which the absence of employment architecture produces militarised alternatives.

Against this backdrop, Botswana is routinely invoked as the counterexample. Its diamond revenues have been managed through comparatively stable institutions, with sustained investment in education and public goods. It is often cited as proof that the resource curse is not inevitable. This is broadly correct, but incomplete. Botswana's success rests not only on governance choices but on timing, population scale and the sequencing of state formation relative to resource discovery. Replicating that model in larger, faster-growing, more geopolitically entangled states is far more difficult.

The more pressing question is whether any resource-dependent economy can now avoid the structural trap of youth exclusion under contempo-

rary global conditions. Automation reduces labour demand in extraction. Capital intensity concentrates revenue. And global supply chains reward speed over social embedding. The outcome is a narrowing corridor in which resource wealth translates into employment.

Policy responses remain fragmented. Local content requirements, sovereign wealth funds, and artisanal mining formalisation programmes all address parts of the problem. Yet few confront the central issue, the need to convert resource rents into mass employment systems at scale and speed. That requires not only fiscal redistribution but industrial strategy, education reform and, crucially, political incentives aligned with youth incorporation rather than containment.

Without such a shift, the resource curse will continue its evolution. It will no longer be defined primarily by corruption or volatility, but by a deeper and more destabilising feature: the systematic exclusion of the majority demographic in the world's most resource-endowed societies. In that context, instability is not an external shock. It is an internal labour market equilibrium.

And if rebellion becomes the only functioning job market for young men in resource-rich states, then the curse is no longer about what these countries have beneath the ground. It is about what they have failed to build above it.

2050 scenarios

Demography, it is often said, is destiny. By mid-century it may prove to be more than that: it may be the principal fault line of global order. The world is quietly moving towards a population configuration unlike any in modern history. Africa and South Asia together are projected to account for roughly 2.5 billion young people by 2050, forming the largest concentration of working-age population ever seen.

Whether this becomes the engine of a new economic renaissance or the catalyst for systemic instability will depend less on inevitability than on policy

choices already being made. Three broad geopolitical trajectories can be discerned: a global manufacturing realignment, a fortified-rich-world "Great Wall", and a disorderly fragmentation best described as chaos cascade.

In the most optimistic trajectory, the centre of gravity of global production drifts decisively south and east. Rising wages in today's industrial powers, combined with automation that decentralises production, encourage firms to diversify manufacturing across Africa and South Asia. By 2050, these regions collectively account for up to 40% of global manufactured output.

This is not a simple rerun of China's export-led ascent. Instead, it is a multi-polar industrialisation process: textile clusters in Ethiopia and Bangladesh, pharmaceutical manufacturing in India and Nigeria, battery assembly across the East African corridor. Supply chains become shorter, more regional, and more resilient.

The geopolitical consequences are profound but stabilising. Migration pressures ease as employment opportunities expand locally. Urbanisation, though rapid, is more absorbable. A middle class emerges

across multiple states simultaneously, creating not only consumers but also stakeholders in global stability.

Yet this scenario requires conditions that are far from guaranteed: sustained infrastructure investment, credible governance, and above all, political continuity. Without these, manufacturing shifts may simply skim off coastal enclaves while leaving hinterlands behind, sowing internal instability rather than global convergence.

In the second trajectory, the wealthy world reacts not with integration but with insulation. Facing political pressure at home, ageing populations, and intermittent migration crises, advanced economies adopt increasingly hard borders, digital, legal, and physical.

Immigration systems become selectively porous: talent is courted, while low-skilled migration is largely blocked. Supply chains are "friend-shored" into a narrow circle of trusted states, with critical industries reshored entirely. Climate stress and pandemics reinforce the logic of containment.

Africa and South Asia, in turn, do not converge but diverge internally. Some states integrate into global

networks; others become trapped in cycles of underemployment and fiscal fragility. Migration does not fall—it is displaced into regional corridors, intensifying pressure on neighbouring countries. Refugee flows of tens of millions per year become a recurring political shock rather than a temporary crisis.

The result is not outright decoupling but a stratified world: connected at the top, fragmented at the base. Economic growth persists, but unevenly. Diplomacy becomes transactional and crisis-driven, focused on containment rather than development. The notion of a shared global system weakens, replaced by parallel orders with limited interoperability.

The bleakest trajectory is not a single catastrophe but a compounding sequence of them. Climate stress interacts with demographic youth bulges, weak governance, and periodic pandemics to produce chronic instability across several regions simultaneously.

In this world, state capacity becomes the decisive variable. Where institutions are strong, adaptation is possible. Where they are weak, legitimacy erodes quickly. Competition for water, arable land, and urban employment intensifies. Regional wars, often proxy in nature, flare and subside without resolution.

Migration becomes both cause and consequence of instability. Instead of orderly flows, there are sudden surges: displacement events triggered by conflict, crop failure, or disease outbreaks. A figure of 100 million displaced persons annually is not implausible in this scenario, though it would fluctuate widely.

Global governance, already strained, struggles to respond. Multilateral institutions become reactive rather than preventive. Humanitarian systems operate at the limits of capacity. Economic growth in affected regions collapses intermittently, producing a feedback loop between insecurity and underdevelopment.

Across all three scenarios, one structural question looms: what form of state can absorb demographic expansion without fragmentation?

Large federations such as India face a delicate balancing act between central authority and regional autonomy. Too much centralisation risks alienation in diverse provinces; too little risks fiscal and political fragmentation. Ethiopia, with its recent history of internal conflict, illustrates the opposite danger: federal arrangements that may prove too brittle under strain.

The lesson from history is ambiguous but instructive. Post-war reconstruction in Germany and Japan demonstrated that rapid absorption of young populations into productive economies is possible under conditions of institutional clarity, land reform, and external support. Yet those cases were unusually favourable: homogenous, externally anchored, and heavily resourced.

Replicating such outcomes across dozens of large, diverse, and rapidly growing states will be significantly harder.

At stake is not merely humanitarian stability but global demand itself. In the optimistic scenario, Africa and South Asia become the primary engine of consumption growth, sustaining global capitalism as ageing populations in Europe, East Asia, and parts of the Americas plateau or decline.

In the pessimistic scenarios, however, these regions become net exporters of instability rather than demand. Capital retreats, insurance costs rise, and global investment becomes more risk-averse. The world economy does not collapse, but it ceases to compound at historical rates.

The difference between boom and stagnation may hinge on a narrow set of variables: governance quality, infrastructure financing, climate adaptation, and migration management regimes.

The diplomatic implications are equally stark. Traditional great-power competition will not disappear, but it will increasingly be overlaid by a second axis: competition for stability in demographically young regions.

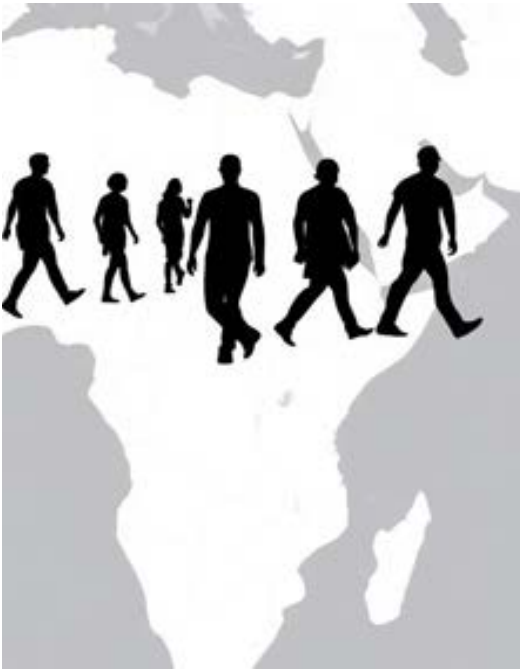
Aid, investment, and security cooperation will converge into hybrid instruments. Development finance will resemble strategic infrastructure policy. Migration agreements will become as important as trade treaties. And military intervention, already politically constrained, will likely be replaced by remote deterrence and intelligence partnerships.

The central diplomatic challenge of mid-century will not be managing scarcity in the traditional sense, but managing abundance of youth in systems insufficiently flexible to absorb it.

Of the three scenarios, none is preordained. The manufacturing shift requires coordination at a scale not yet achieved. The Great Wall requires political

choices that may prove economically self-defeating. The chaos cascade is not inevitable, but it is structurally plausible if governance fails to keep pace with demography.

The youngest century will not be shaped by population growth alone, but by whether institutions evolve quickly enough to convert demographic pressure into economic energy rather than geopolitical friction. History offers no guarantees. It offers only precedents and warnings.



The Youth Bulge

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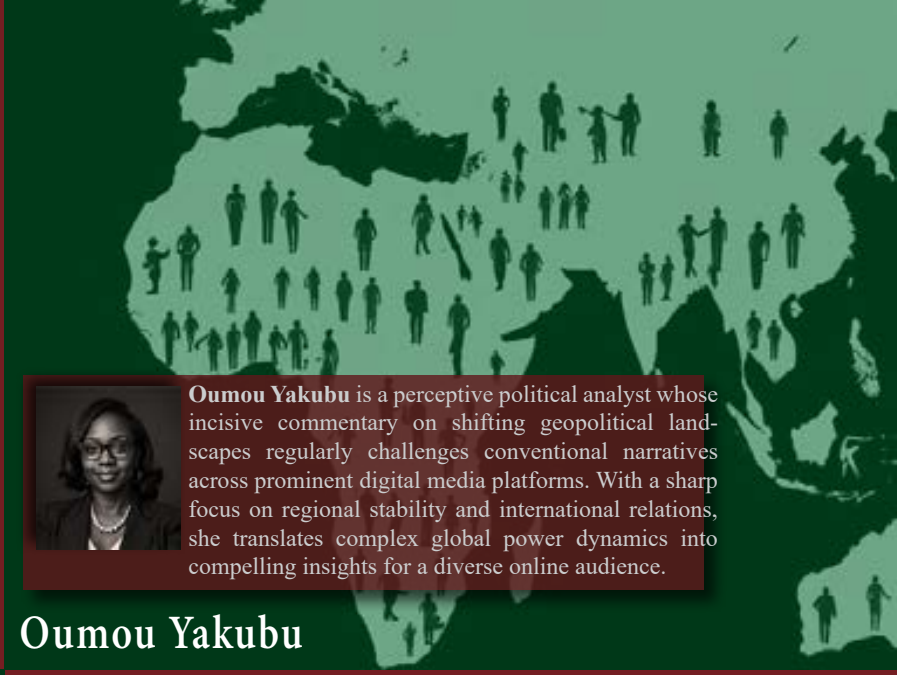

Oumou Yakubu is a perceptive political analyst whose incisive commentary on shifting geopolitical landscapes regularly challenges conventional narratives across prominent digital media platforms. With a sharp focus on regional stability and international relations, she translates complex global power dynamics into compelling insights for a diverse online audience.

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The Youth Bulge

The geopolitics of the African and South Asian youth